

MIDCOAST & ISLANDS

2023 Economic Impact & Visitor Tracking Report
DECEMBER 2022 – NOVEMBER 2023

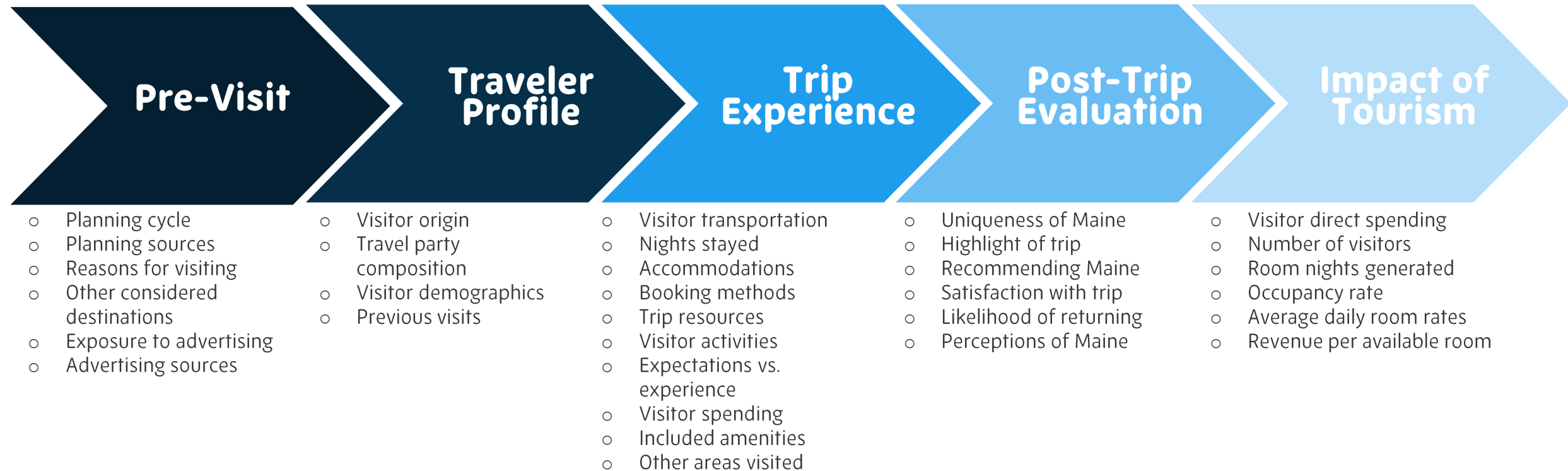


STUDY OBJECTIVES: VISITOR JOURNEY

This report presents information about visitors to Maine from December 2022 to November 2023.

In the report, we follow the visitors in their journeys.

Along the way, we examine profiles of visitors, their experiences in our destination, and how they evaluate experiences in Maine.



EXECUTIVE SUMMARY



MIDCOAST & ISLANDS

Compared to visitors to other regions, visitors to Midcoast & Islands region are more likely to:

- » Use online search engines, Facebook, advice from friends/family, and articles/travelogues to help plan their trips
- » Main reason for visiting be for a special event or special occasion
- » Recall advertising or promotions about Maine and be influenced by it to visit Maine
- » To be a college graduate
- » Use a restaurant website/app or personal social media to enhance their trip while in Maine



VISITOR JOURNEY: IMPACT OF TOURISM



ECONOMIC IMPACT

Visitor spending generated

\$1,680,086,100

in economic impact to Midcoast & Islands'
economy, up 10.9% from 2022



DIRECT SPENDING

Visitors to Midcoast & Islands spent

\$1,112,892,100

throughout the county in 2023 on accommodations, transportation, groceries, restaurants, shopping, entertainment, and other expenses, up 10.1% from 2022



VISITORS

Midcoast & Islands attracted

2,056,600

visitors in 2023, up 2.1% from 2022



Midcoast & Islands

8

VISITORS DAYS*

All visitors to Midcoast & Islands spent

10,082,600

days in Midcoast & Islands throughout 2023,
up 2.5% from 2022



*Visitor days is the total number of days spent by visitors in the state of Maine. This includes overnight visitors and day trippers.

Midcoast & Islands

ROOM NIGHTS

Visitors to Midcoast & Islands generated

1,841,000

nights in Midcoast & Islands accommodations
throughout 2023, up 13.3% from 2022



JOBS SUPPORTED*

Visitors to Midcoast & Islands supported

14,500

jobs throughout the county in 2023, down
9.9% from 2022



*Changes in jobs supported are largely due to year over year differences in IMPLAN modeling, however, there is a national trend of hotels employing fewer people.

Midcoast & Islands

WAGES GENERATED

Visitors to Midcoast & Islands supported

\$579,754,500

in wages paid to Midcoast & Islands
employees in 2023, up 12.7% from 2022



VISITORS & JOBS

Every
142

visitors supports a new job in Midcoast & Islands



Midcoast & Islands

13

HOUSEHOLD SAVINGS

Visitors to Midcoast & Islands saved local households

\$2,360

in state and local taxes in 2023



LODGING METRICS*

Occupancy Rate

57.2%

+ 3.9% from 2022

Average Daily Rate

\$178.25

+ 4.9% from 2022

Revenue per Available Room

\$102.00

+ 8.9% from 2022

*Lodging metrics include all paid accommodations type like hotels, vacation rentals, B&B, etc.
Sources: Key Data & STR.

Midcoast & Islands

VISITOR JOURNEY: PRE-VISIT



TRIP PLANNING CYCLE

- » 76% of visitors started planning their trip a month or more in advance of their trip
- » 55% of visitors have a booking window of less than 3 months



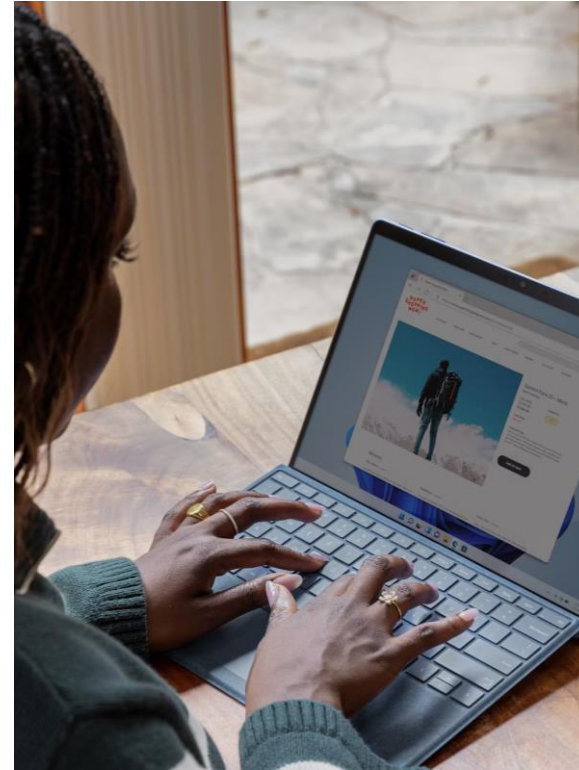
TOP TRIP PLANNING SOURCES*



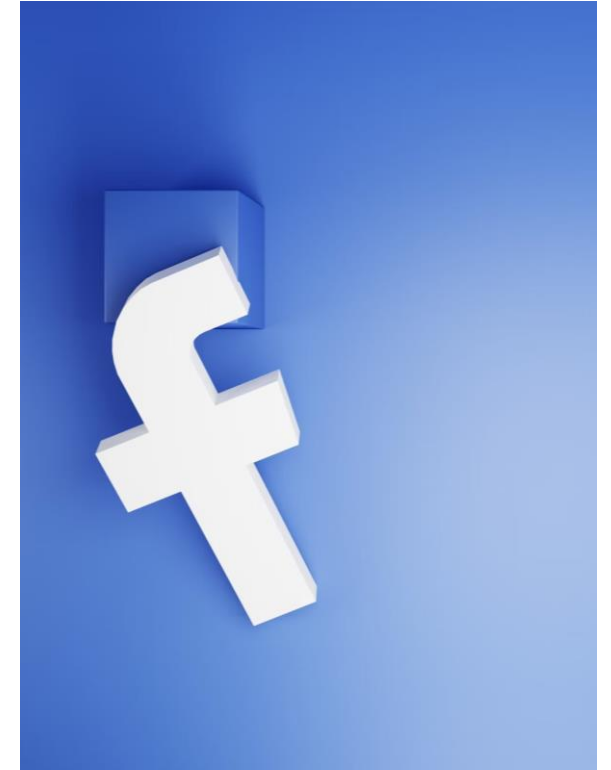
71% Advice from family/friends



50% Online search engines



35% Articles or travelogues



29% Facebook

TOP REASONS FOR VISITING*



46% Visit friends/relatives



25% Relax and unwind



24% Special Occasion

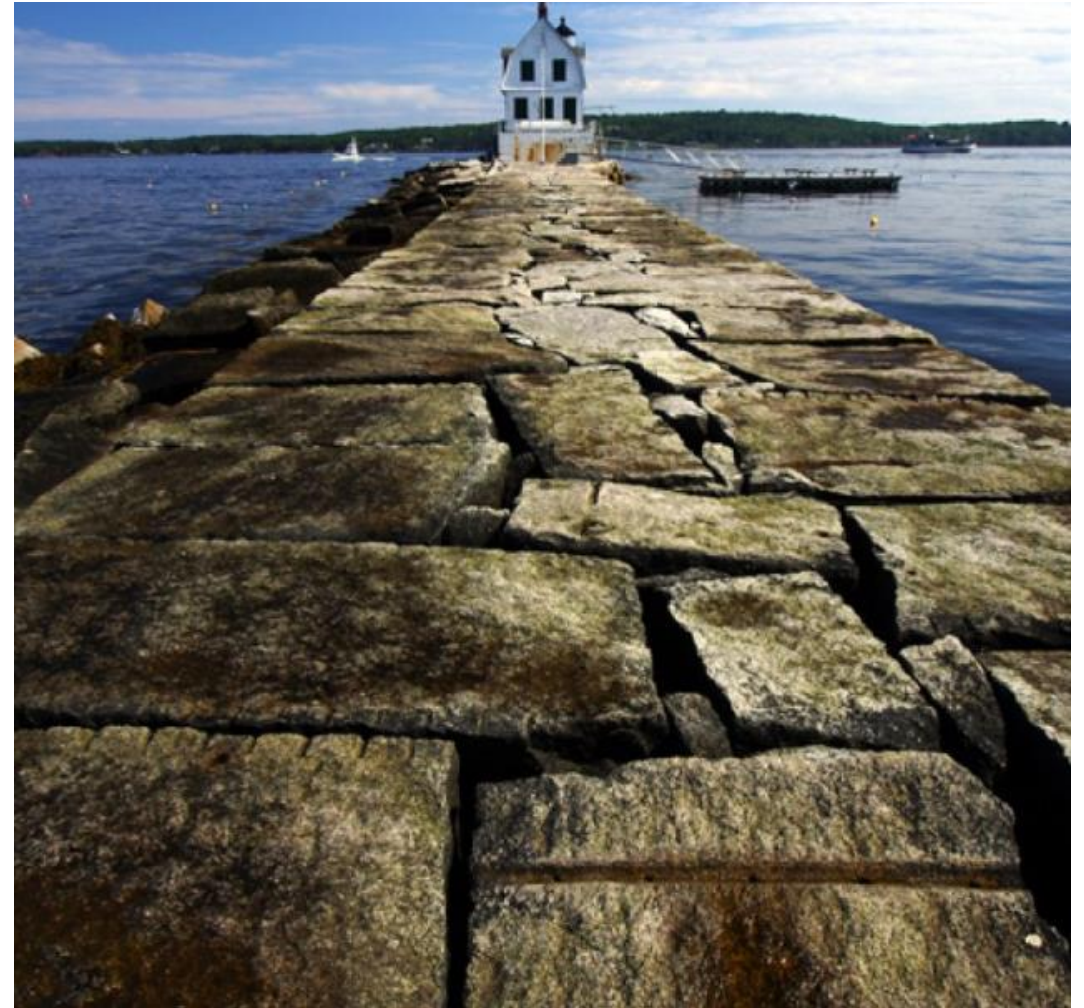
CONSIDERING MAINE AS A DESTINATION

- » Over **half** of visitors considered visiting **ONLY** Maine while planning their trips
- » Nearly **1 in 3** visitors considered visiting New Hampshire while planning their trips



TV SHOWS & FILM*

- » 3% of visitors said a TV show or film inspired their trip to Maine
- » 83% of visitors who were inspired by a TV show or film said visiting a location of a TV show or film was one of the activities they engaged in while in Maine



*Questions were not asked until January 2023.

PRE-TRIP RECALL OF ADVERTISING

- » 2 in 3 of visitors recalled advertising or promotions for Maine prior to their trip
- » This information influenced 40% of all visitors to visit Maine



TOP SOURCES OF ADVERTISING RECALL*

Base: 66% of visitors who recalled advertising



56% Social media



34% Internet

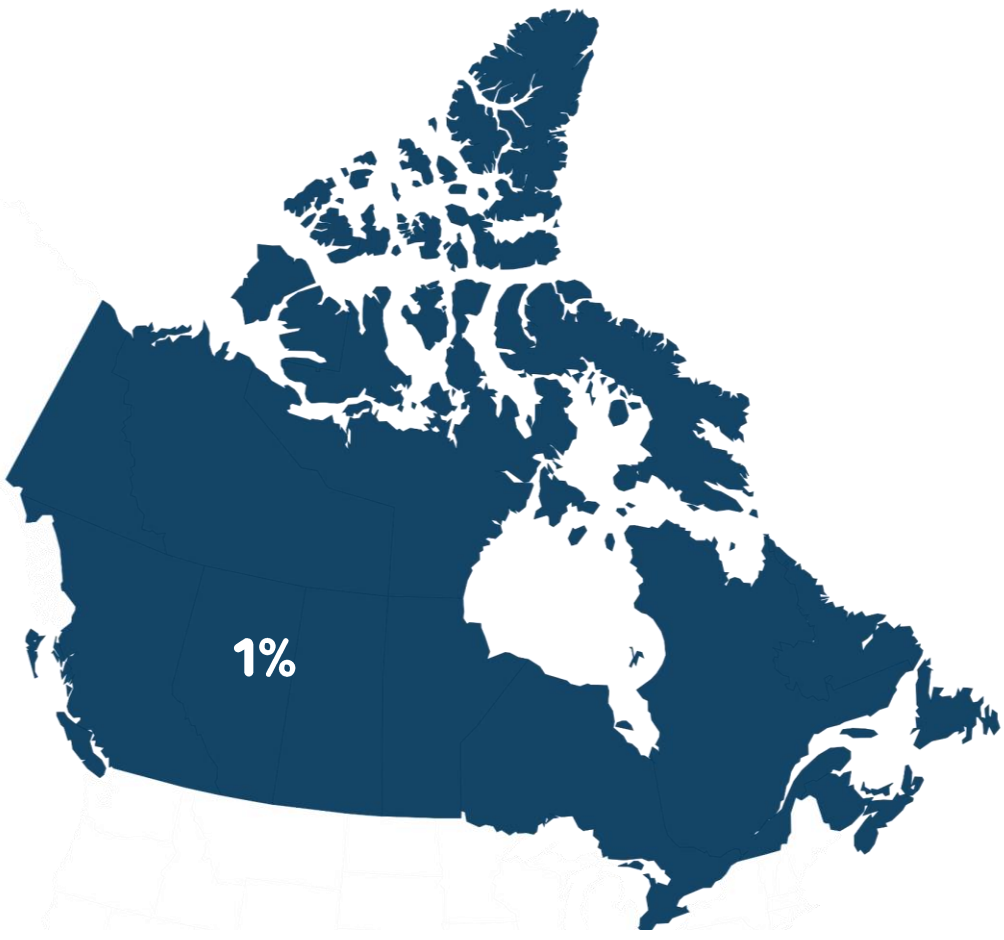
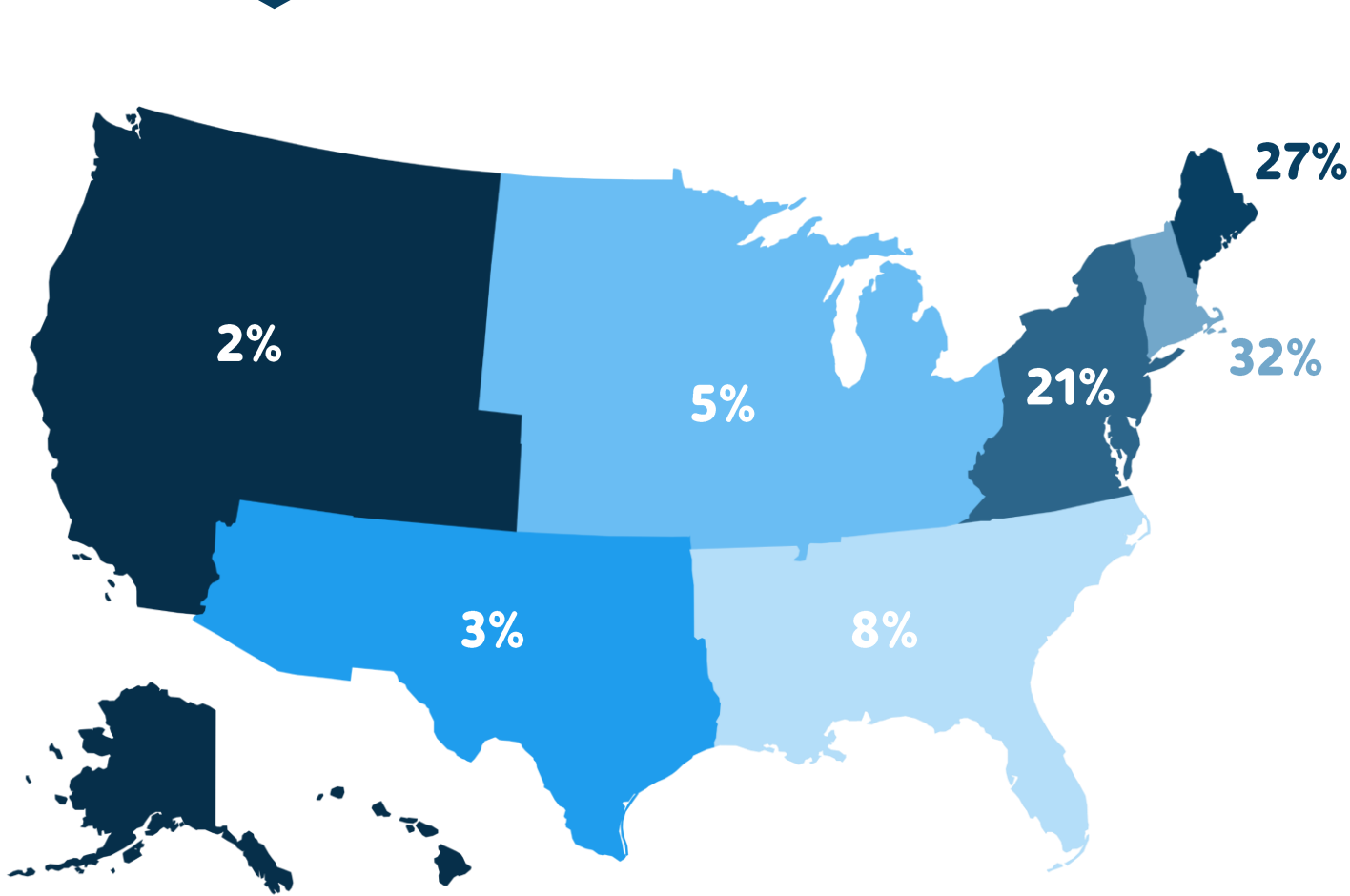


30% Magazine

VISITOR JOURNEY: TRAVELER PROFILE



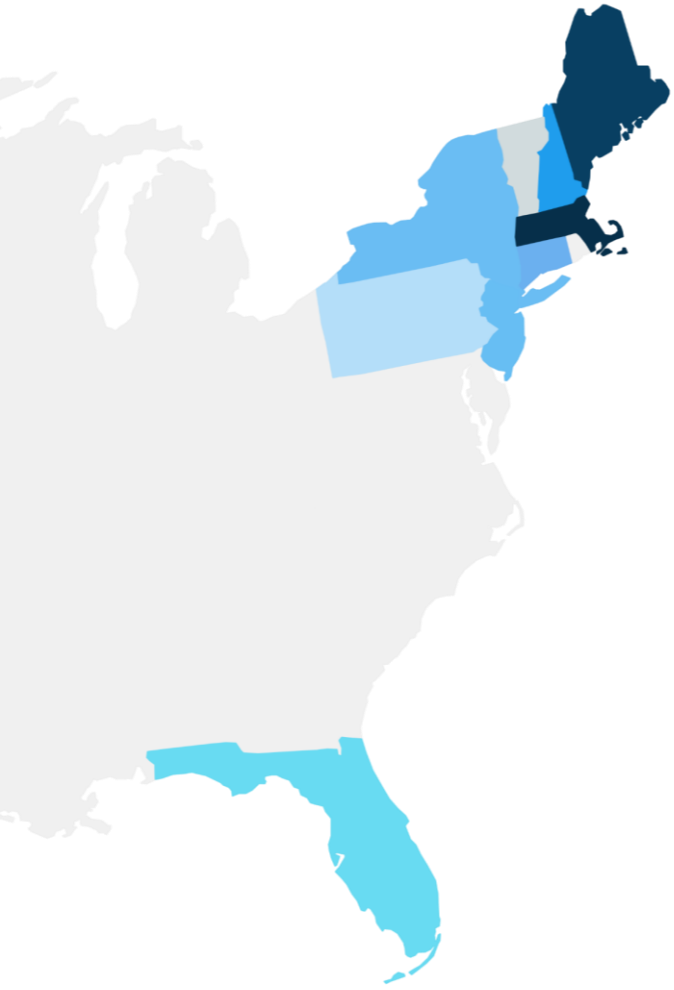
REGIONS OF ORIGIN



1% of visitors came from outside of the United States and Canada.

1% of visitors came from Canada.

TOP ORIGIN STATES & PROVINCES



77%

of visitors traveled from **8** U.S. states, including from other regions of Maine.

27	% Maine	7	% Connecticut
15	% Massachusetts	5	% New Jersey
8	% New Hampshire	4	% Florida
8	% New York	3	% Pennsylvania

Midcoast & Islands

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TOP ORIGIN MARKETS



9% Boston



8% New York City¹



4% Portland

¹Includes some markets in New Jersey, Pennsylvania, and Connecticut.

Midcoast & Islands

TRAVEL PARTIES

The typical Maine visitor traveled with **2.9** people in their visitor party



13% of visitors traveled with at least one person under the age of 18 in their travel party



VISITOR PROFILE

» The typical Maine visitor:

- » Is 52 years old¹
- » Is white – 89%
- » Is a college graduate – 86%
- » Is married/in a domestic partnership – 80%
- » Is employed full-time – 45%
- » Has an annual household income² of \$79,300



¹Median age.

²Median household income.

NEW & RETURNING VISITORS

- » 15% of visitors were traveling in Maine for the first time
- » Maine has high repeat and loyal visitors, as 25% had previously traveled in Maine more than 10 times



VISITOR JOURNEY : TRIP EXPERIENCE



TRANSPORTATION

- » Maine is a drive-market for most visitors, with **84%** choosing to travel by car over plane, motor coach/bus, or train



NIGHTS STAYED

- » 88% of visitors stayed one or more nights in Maine on their trip
- » Typical visitors stayed 4.8* nights in Maine on their trips



*Includes visitors staying overnight in paid accommodations, visiting friends & relatives, and day trippers.

Midcoast & Islands

TOP ACCOMMODATIONS



32% Hotel/motel/resort



20% Friends/family home



14% Vacation rental home

TOP IN-MARKET VISITOR RESOURCES*



65% Restaurant website/app



47% Navigation website/apps (i.e., Google or Apple Maps, etc.)



40% Personal social media

TOP VISITOR ACTIVITIES*



82% Food/beverage/culinary



62% Shopping

VISITING OTHER STATES & PROVINCES

- » Nearly **2 in 3** visitors did not visit any other U.S. state or Canadian province during their trip
- » About **1 in 4** visitors also went to New Hampshire during their trip



TRAVELING WITHIN MAINE

- » Half of visitors visited the Greater Portland & Casco Bay region in addition to their primary destination within Maine
- » Nearly 2 in 5 visitors stayed within the region of their primary destination during their trip in Maine, rather than traveling throughout the state



VISITOR JOURNEY : POST-TRIP EVALUATION



RECOMMENDING MAINE & ITS REGIONS

- » 97% of visitors would recommend that their friends and family choose Maine as their destination for a future visit or vacation
- » 98% of visitors would recommend that their friends and family visit the specific region of Maine that they traveled to on their trip – 63% would definitely recommend



LIKELIHOOD OF RETURNING TO MAINE

- » **88%** of visitors will return to Maine for a future visit or vacation
- » **56%** of visitors were highly satisfied with their trip in Maine and will “definitely return” in the future



SATISFACTION

- » 98% of visitors were satisfied with their trip to Maine
- » 17% were very satisfied with their trip to Maine



OVERCROWDING

- » 44% of visitors thought the number of visitors during their trip to Maine was fine
- » 36% of visitors thought it was a little overcrowded



DETAILED FINDINGS



VISITOR JOURNEY: IMPACT OF TOURISM



KEY PERFORMANCE INDICATORS

Economic Impact	2021	2022	2023	Δ% from '22
Number of Visitors	2,089,400	2,013,900	2,056,600	+ 2.1%
Visitor Days*	NA	9,832,100	10,082,600	+ 2.5%
Room nights generated	1,371,600	1,624,200	1,841,000	+ 13.3%
Direct expenditures	\$972,872,000	\$1,010,423,900	\$1,112,892,100	+ 10.1%
Total economic impact	\$1,462,644,500	\$1,514,991,300	\$1,680,086,100	+ 10.9%

*Visitor Days is the total number of days spent by visitors in the state of Maine. This include overnight visitors and day trippers.

EMPLOYMENT IMPACTS

Midcoast & Islands Jobs	2021	2022	2023	Δ% from '22
Jobs supported (direct)	12,400	12,500	11,300	- 9.6%
Total jobs supported	16,100	16,100	14,500	- 9.9%*

Midcoast & Islands Wages	2021	2022	2023	Δ% from '22
Wages paid (direct)	\$360,739,800	\$376,298,500	\$422,679,100	+ 12.3%
Total wages paid	\$494,687,000	\$514,503,100	\$579,754,500	+ 12.7%

*Changes in jobs supported are largely due to year over year differences in IMPLAN modeling, however, there is a national trend of hotels employing fewer people.

RETURN ON INVESTMENT

Return on Investment	2021	2022	2023
Visitors per job supported	130	125	142
State & local taxes supported	\$124,221,800	\$127,627,800	\$158,001,600
Tax savings per household	\$1,894	\$1,934	\$2,360

LODGING METRICS*

Lodging Metrics	2021	2022	2023	Δ% from '22
Occupancy Rate (%)	51.2%	55.1%	57.2%	+ 3.9%
Average Daily Rate	\$168.04	\$169.98	\$178.25	+ 4.9%
RevPAR	\$86.04	\$93.66	\$102.00	+ 8.9%
Total Lodging Revenue**	\$241,426,700	\$244,260,800	\$246,144,000	+ 0.8%

*Lodging metrics include all paid accommodations type like hotels, vacation rentals, B&B, etc.

Sources: Key Data & STR.

**Source: State of Maine Revenue Services.

Midcoast & Islands

VISITOR JOURNEY : PRE-VISIT



TRIP PLANNING CYCLE

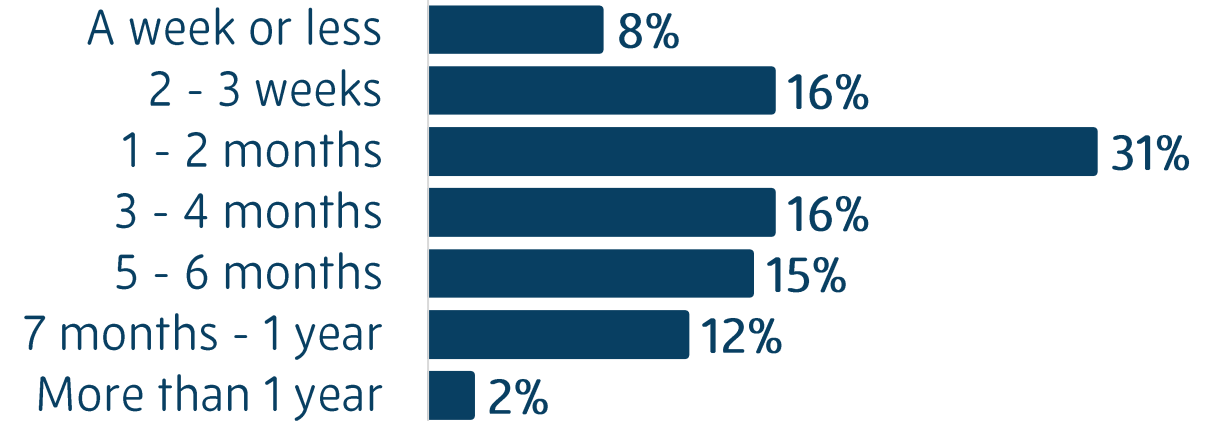
» Typical visitors began planning their trip **55 days** in advance (-5 days from 2022)

» **76%** of visitors started planning their trip a month or more in advance of their trip

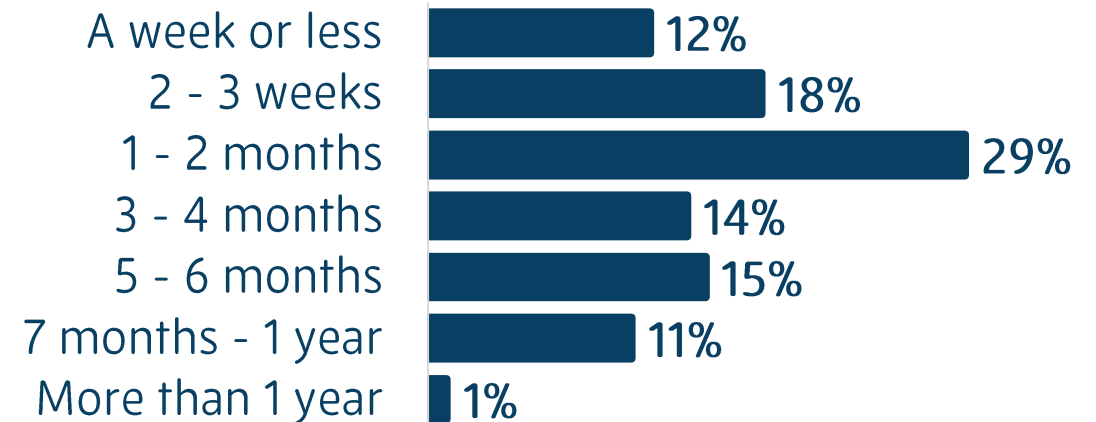
» Typical visitors booked their accommodations **51 days** in advance (-2 days from 2022)

» **59%** of visitors have a booking window of less than 3 months

Beginning of Trip Planning Cycle

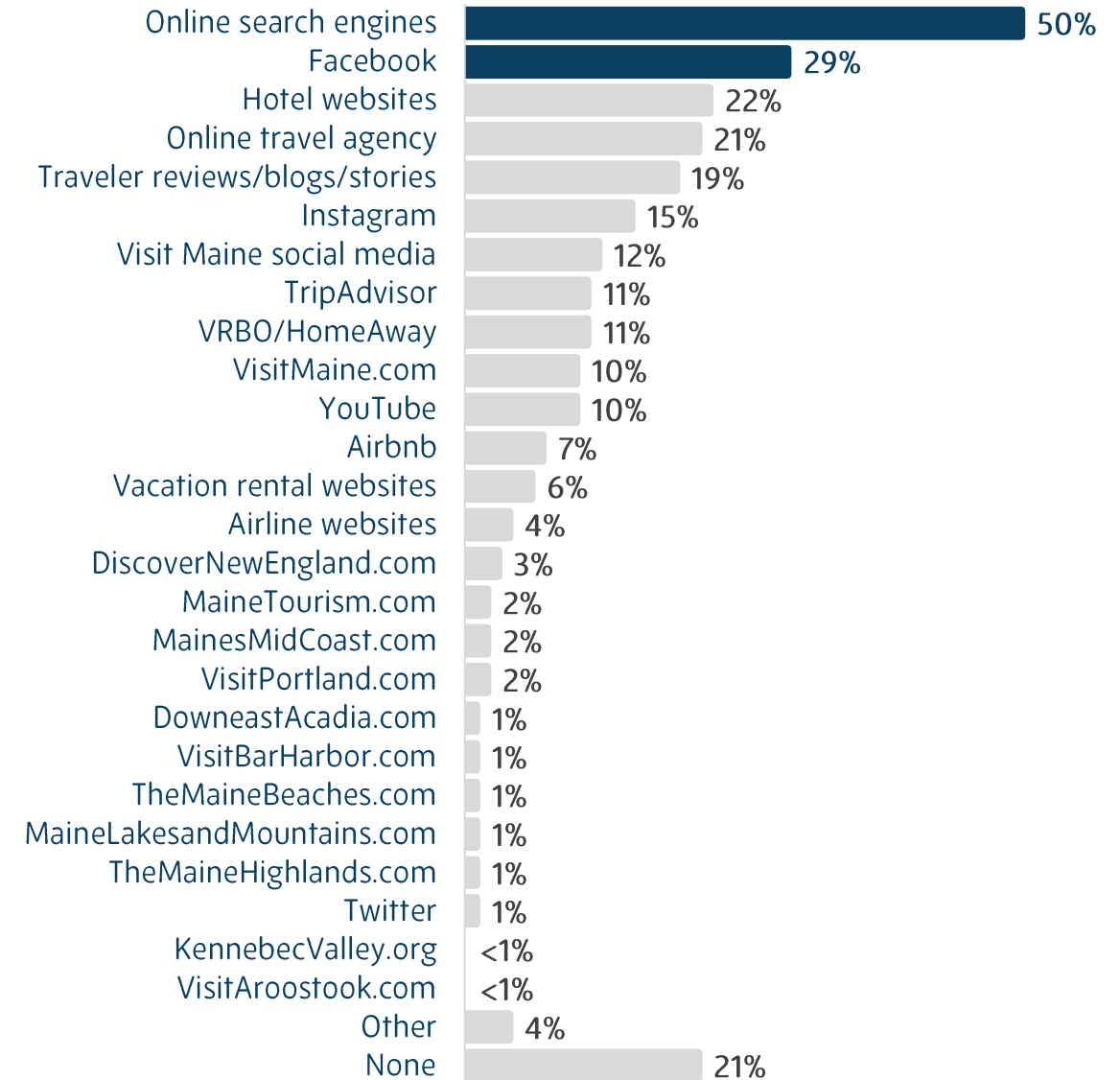


Booked Accommodations/Made Trip Decisions



ONLINE TRIP PLANNING SOURCES*

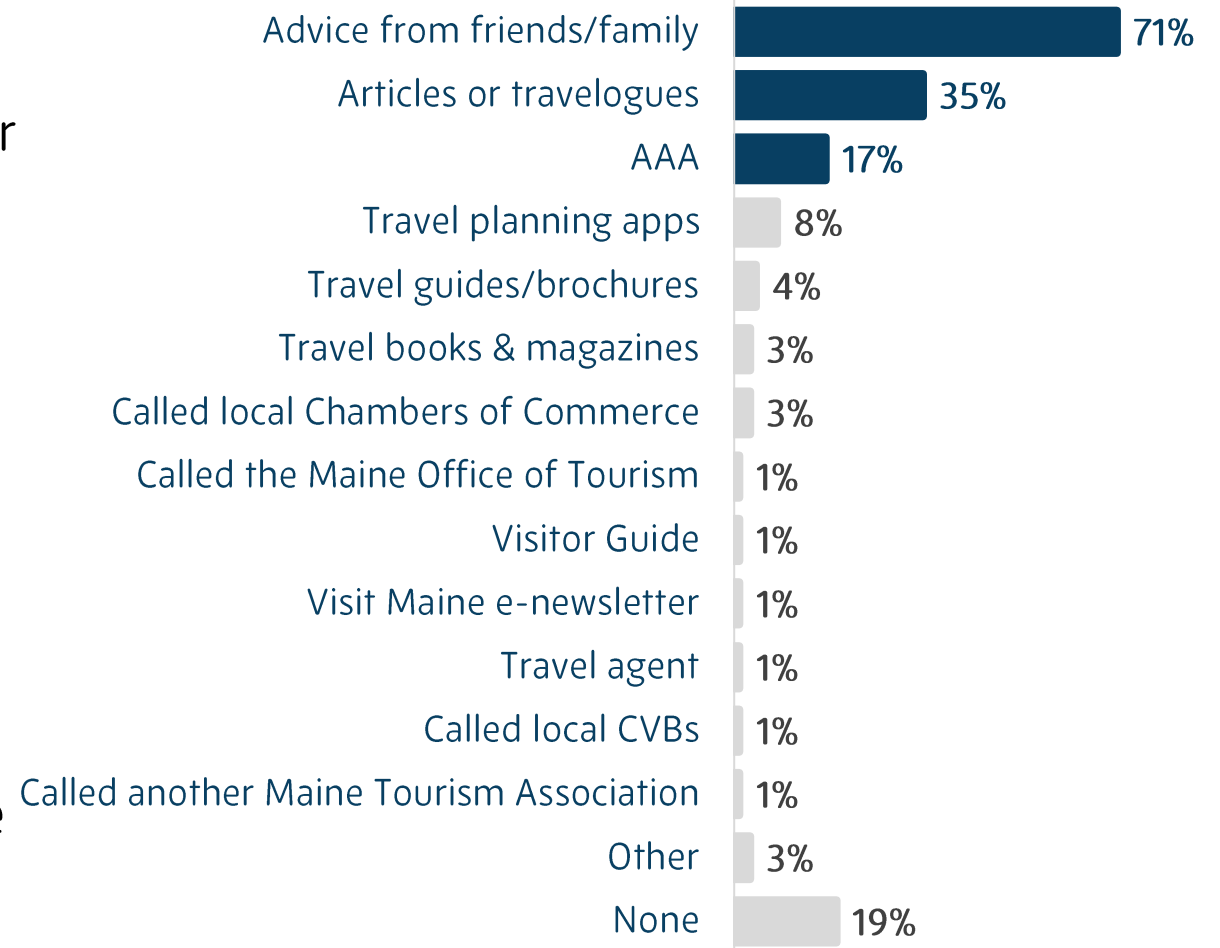
- » Nearly **4 in 5** visitors used one or more online resources to help them plan their trip in Maine
- » **Half** of visitors used an online search engine, such as Google, to help them plan their trip in Maine
- » Nearly **3 in 10** visitors used Facebook (+12% points from 2022)
- » **1 in 10** visitors used VisitMaine.com (-6% points from 2022)



*Multiple responses permitted.

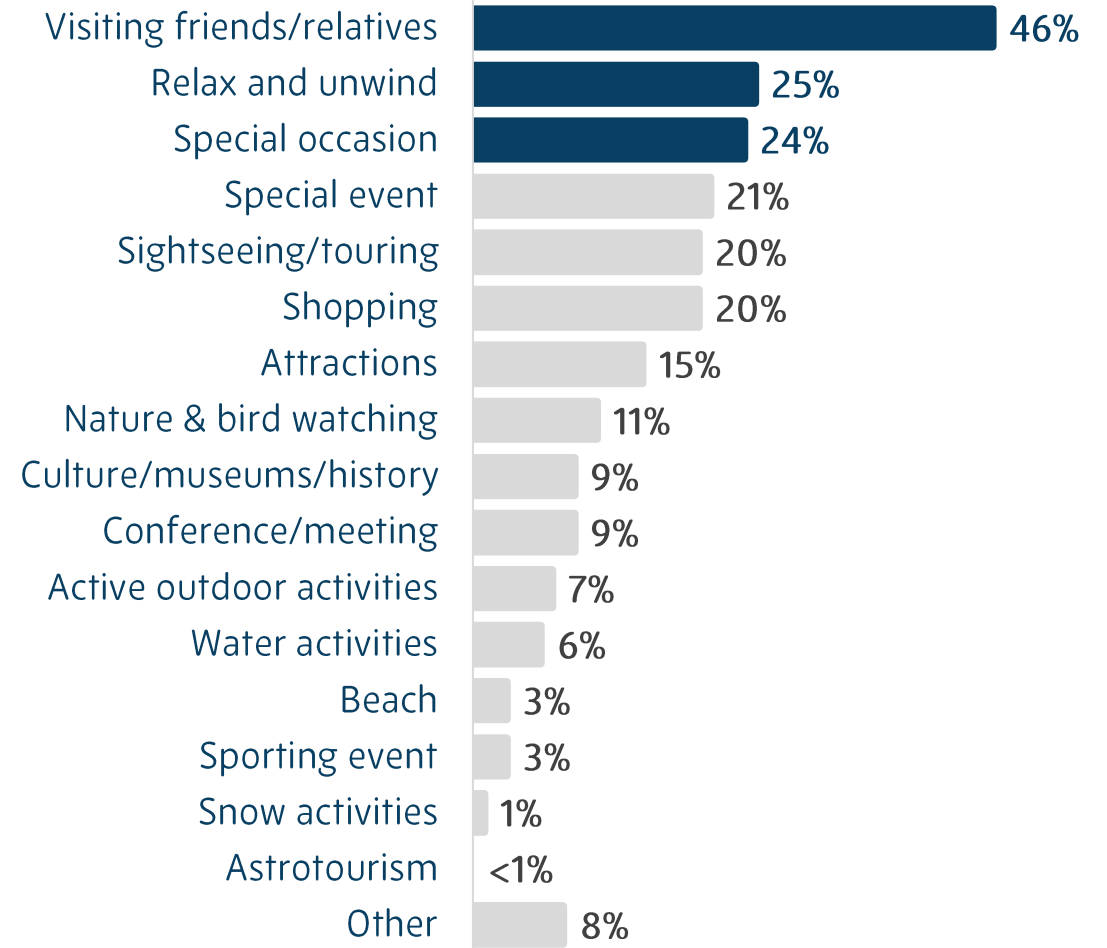
OTHER TRIP PLANNING SOURCES*

- » Over **7 in 10** visitors relied on advice from their friends and family to help them plan their trip in Maine
- » Over **1 in 3** visitors used articles or travelogues to help plan their trip in Maine (-3% points from 2022) and over **1 in 6** used AAA (-9% points from 2022)
- » Nearly **1 in 5** visitors did not use any other resources to help them plan their trip in Maine



REASONS FOR VISITING*

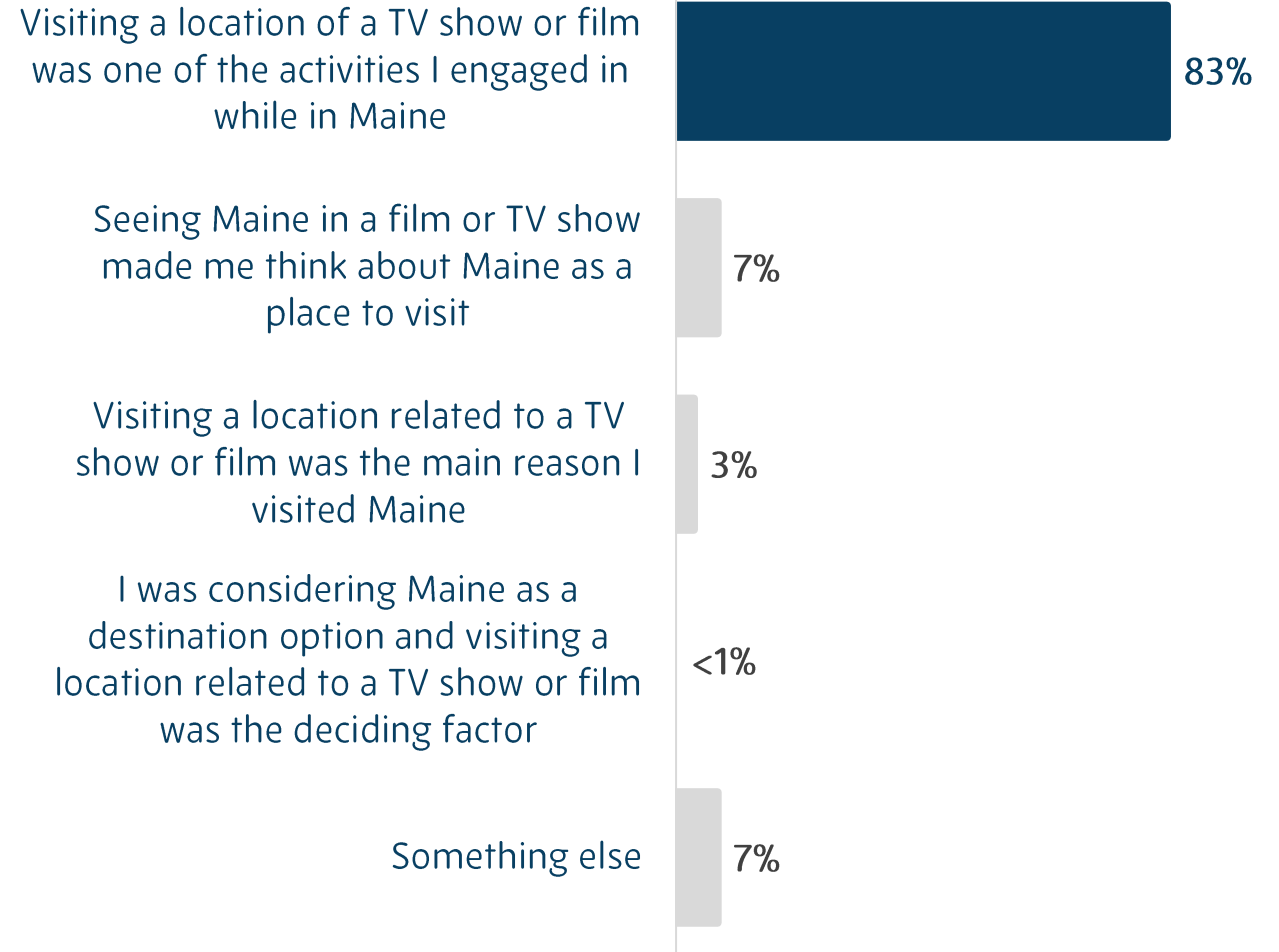
- » Nearly **half** of visitors came to Maine to visit friends and relatives
- » Around **1 in 4** visitors came to Maine to relax and unwind or for a special occasion



TV SHOWS & FILM*

- » 3% of visitors said a TV show or film inspired their trip to Maine
- » 83% of visitors who were inspired by a TV show or film said they visited a related location while in Maine
- » 12% of visitors who were NOT inspired by a TV show or film to visit Maine said they visited the location of a TV show or film while in Maine

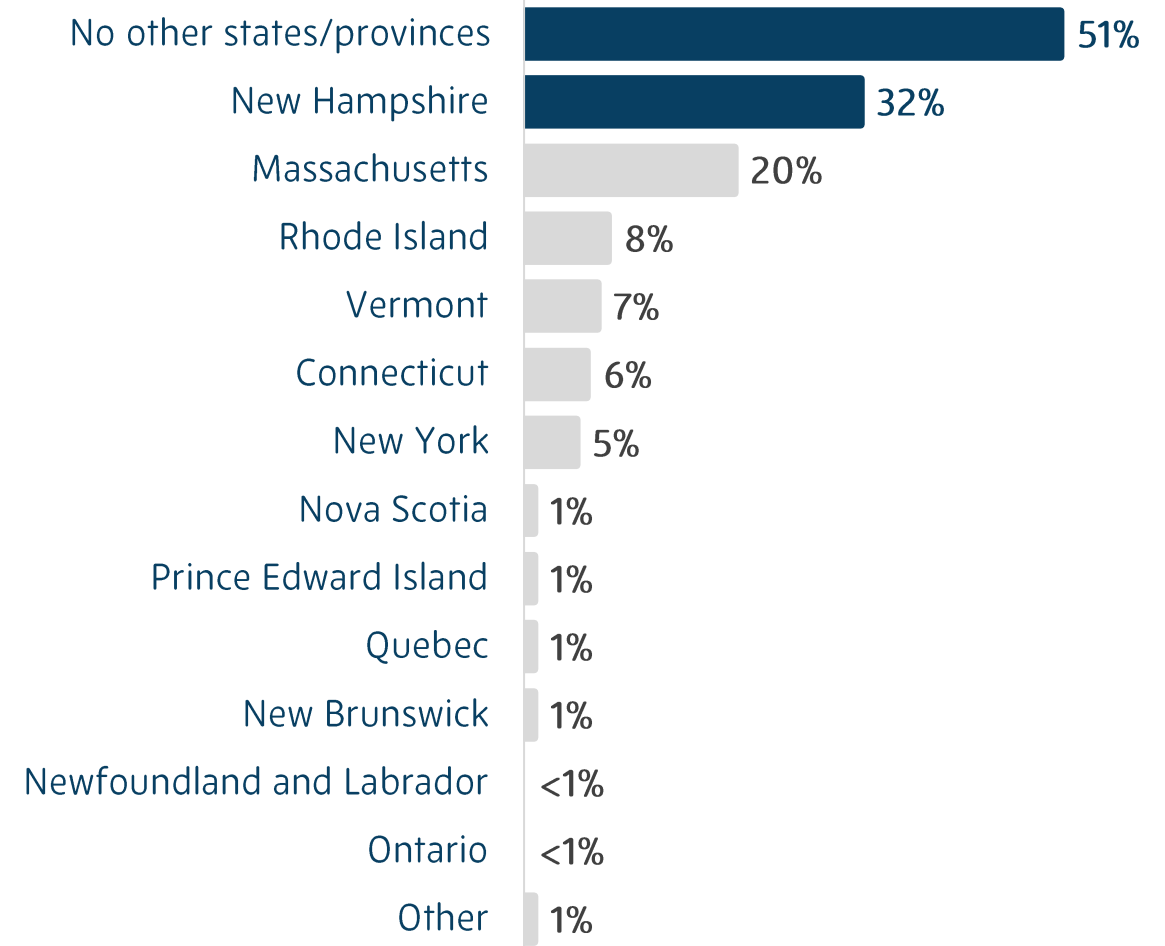
Base: 3% of visitors who were inspired by a TV show or film



*Questions were not asked until January 2023.

OTHER STATES & PROVINCES CONSIDERED*

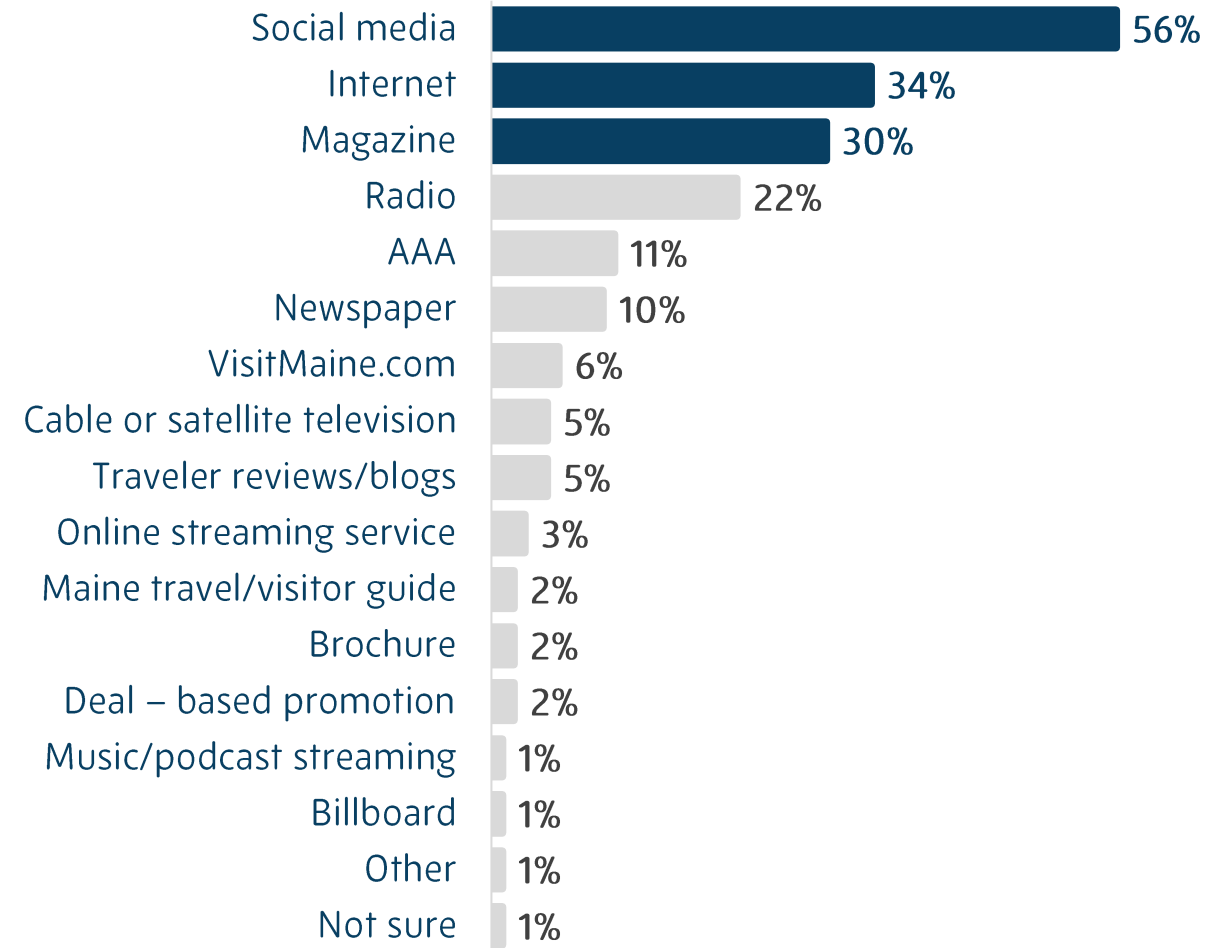
- » **Half** of visitors considered visiting **ONLY** Maine while planning their trips (-6% points from 2022)
- » Nearly **1 in 3** visitors considered visiting New Hampshire while planning their trips
- » Visitors were more likely to consider visiting nearby U.S. states rather than visiting Canadian provinces



PRE-TRIP RECALL OF ADVERTISING*

- » 2 in 3 visitors recalled advertising or promotions for Maine prior to their trip (-7% points from 2022)
- » Visitors who recalled this advertising primarily saw it on social media (+11% points from 2022)
- » This information influenced 40% of all visitors to visit Maine (-11% point from 2022)

Base: 66% of visitors who recalled advertising

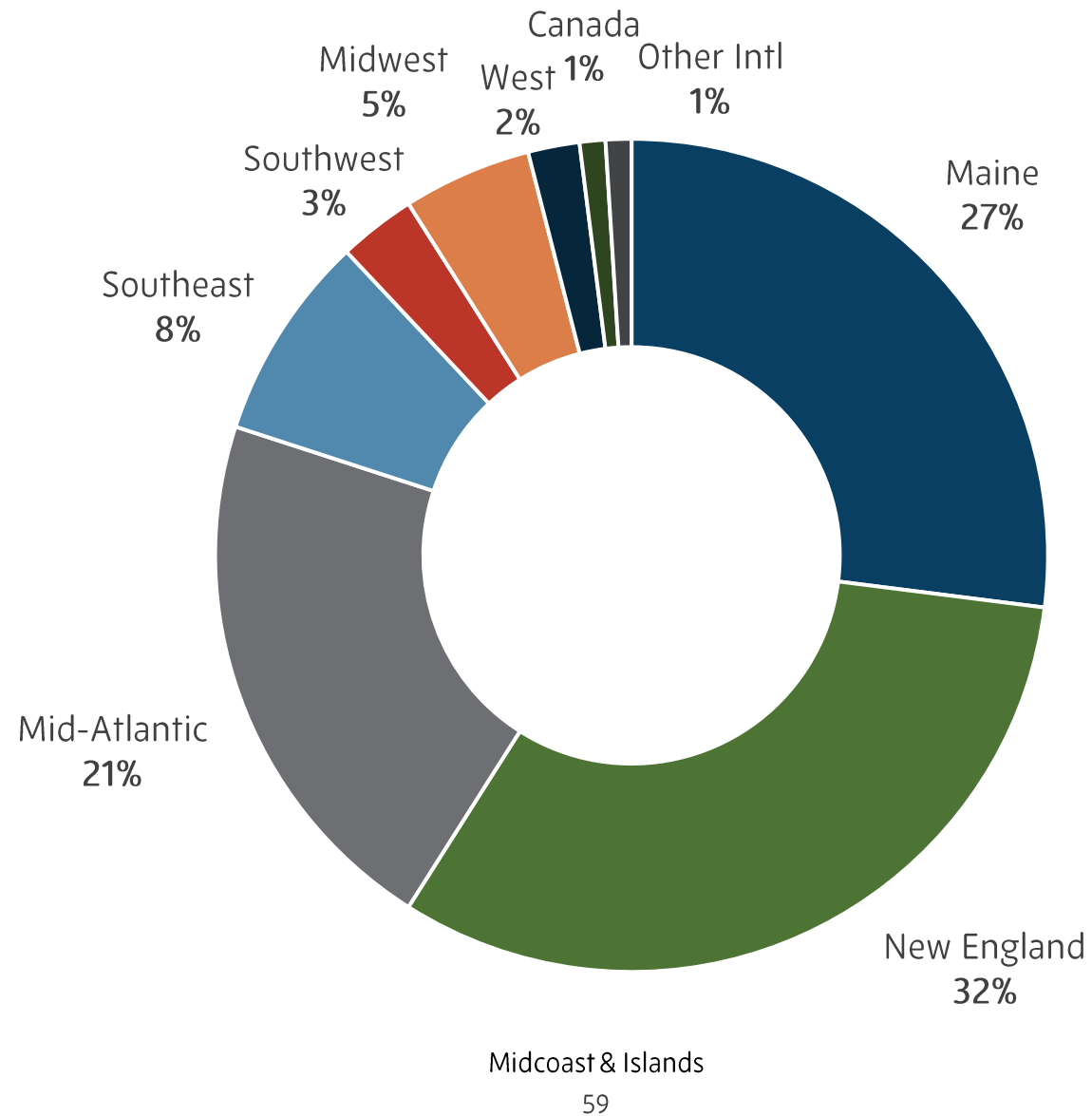


*Multiple responses permitted.

VISITOR JOURNEY : TRAVELER PROFILE



VISITOR ORIGINS



TOP ORIGIN STATES & PROVINCES

- » **83%** of visitors traveled to/within Maine from **11** U.S. states and Canadian provinces
- » Over **1 in 4** visitors were residents of Maine traveling throughout the state

State	Percent
Maine	27%
Massachusetts	15%
New York	8%
New Hampshire	8%
Connecticut	7%
New Jersey	5%
Florida	4%
Pennsylvania	3%
Virginia	2%
Maryland	2%
Rhode Island	2%

TOP ORIGIN MARKETS

- » Nearly **2 in 5** visitors traveled from **10** U.S. markets
- » **17%** of visitors traveled to Maine from Boston or New York City

Market	Percent
Boston	9%
New York City ¹	8%
Portland	4%
Augusta	3%
Washington DC - Baltimore ²	3%
Auburn - Lewiston	3%
Waterville	2%
Belfast	2%
Philadelphia	2%
Providence, RI	2%

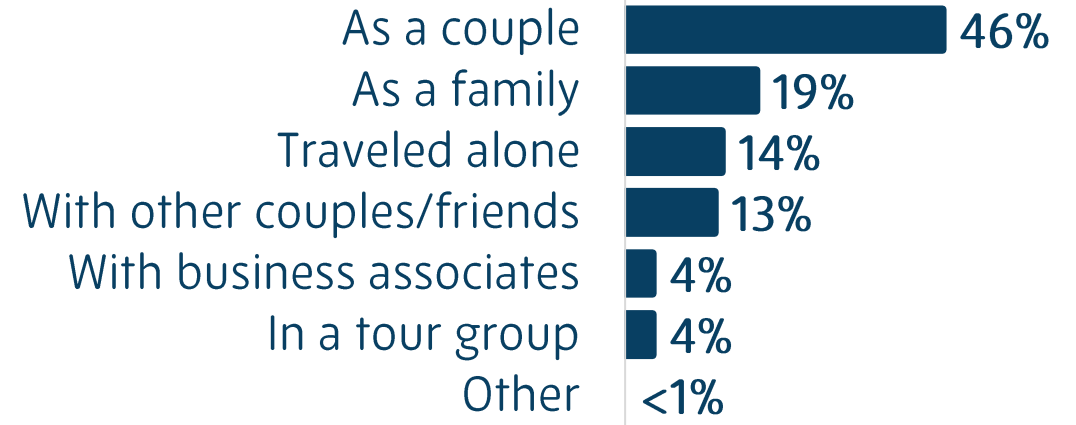
¹Includes some markets in New Jersey, Pennsylvania, and Connecticut.

²Includes some markets in Maryland, Virginia, and West Virginia.

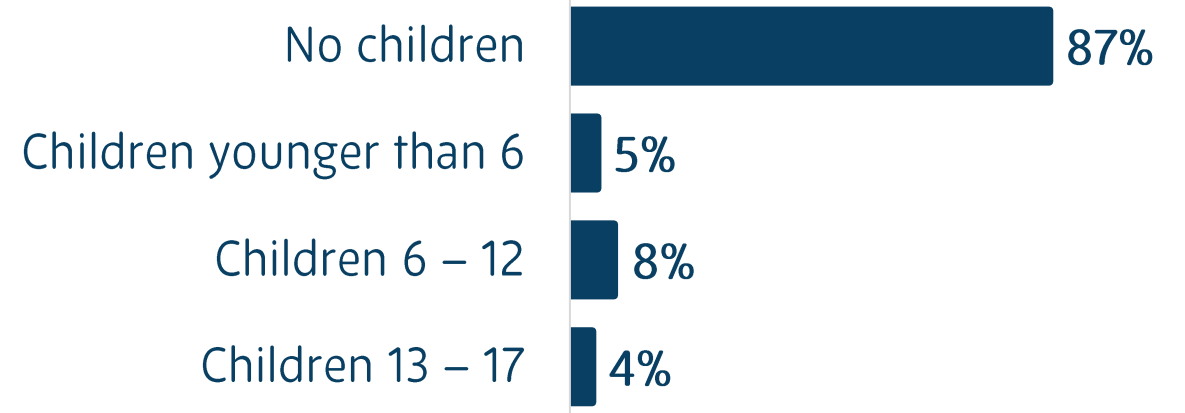
TRAVEL PARTIES

- » Typical visitors traveled to Maine in parties of **2.9** people
- » Nearly **half** of visitors traveled as a couple
- » Almost **1 in 5** traveled as a family
- » **13%** of visitors traveled with one or more children in their travel party

Travel Party Composition



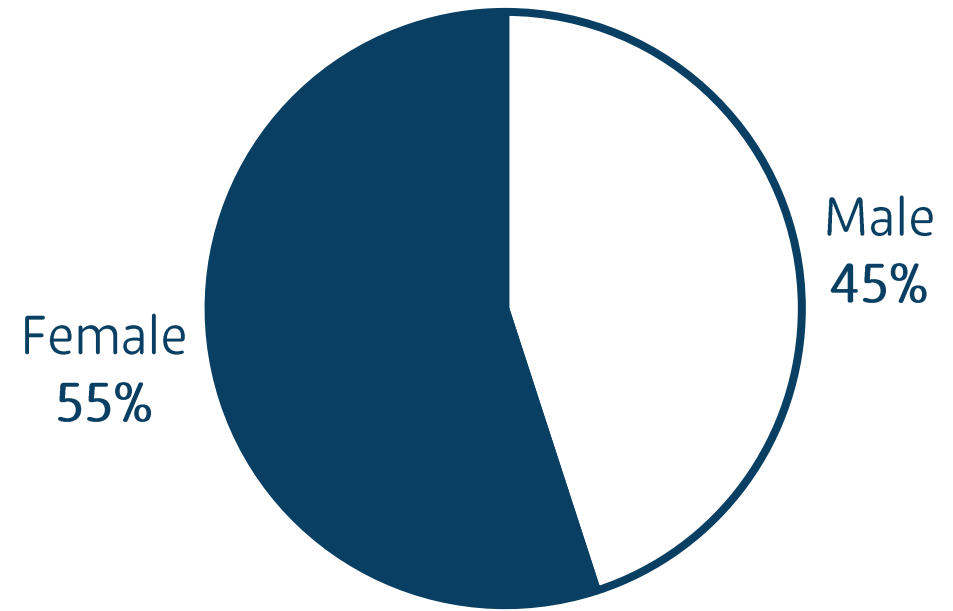
Children in Travel Party*



*Multiple responses permitted.

GENDER

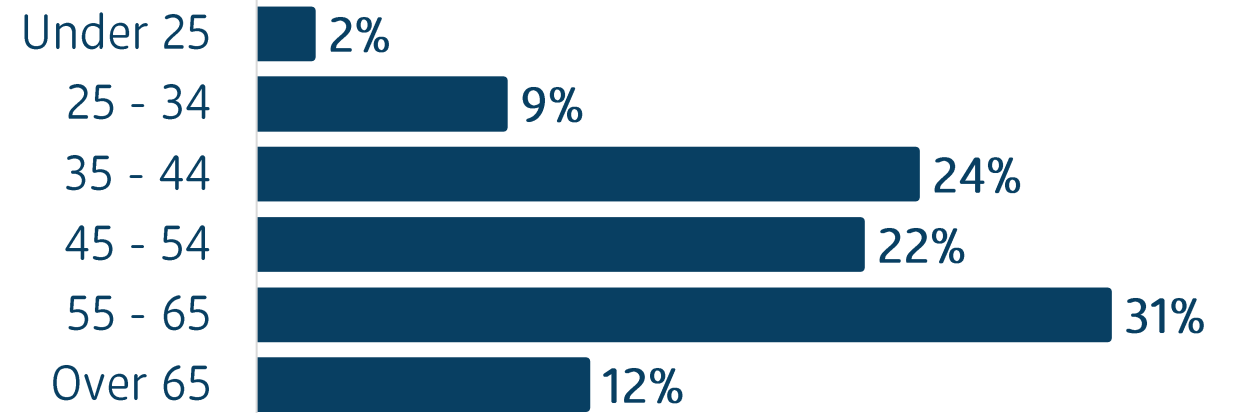
» Over **half** of visitors to Maine interviewed were females*



*May be influenced by visitors' willingness to complete a survey.

AGE

» The average age of visitors to Maine is 52 years old



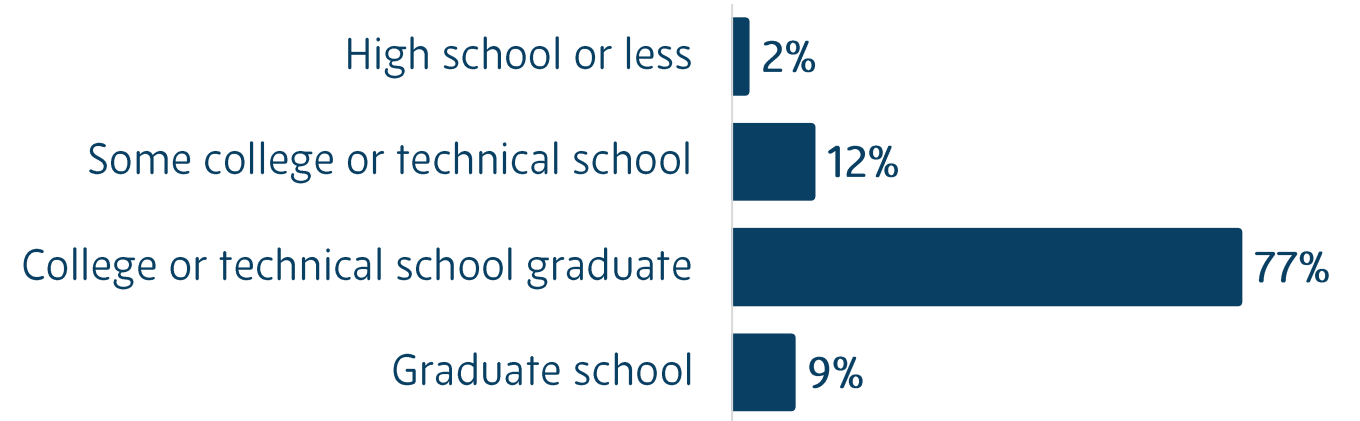
RACE & ETHNICITY

» Nearly 9 in 10 visitors to Maine were white



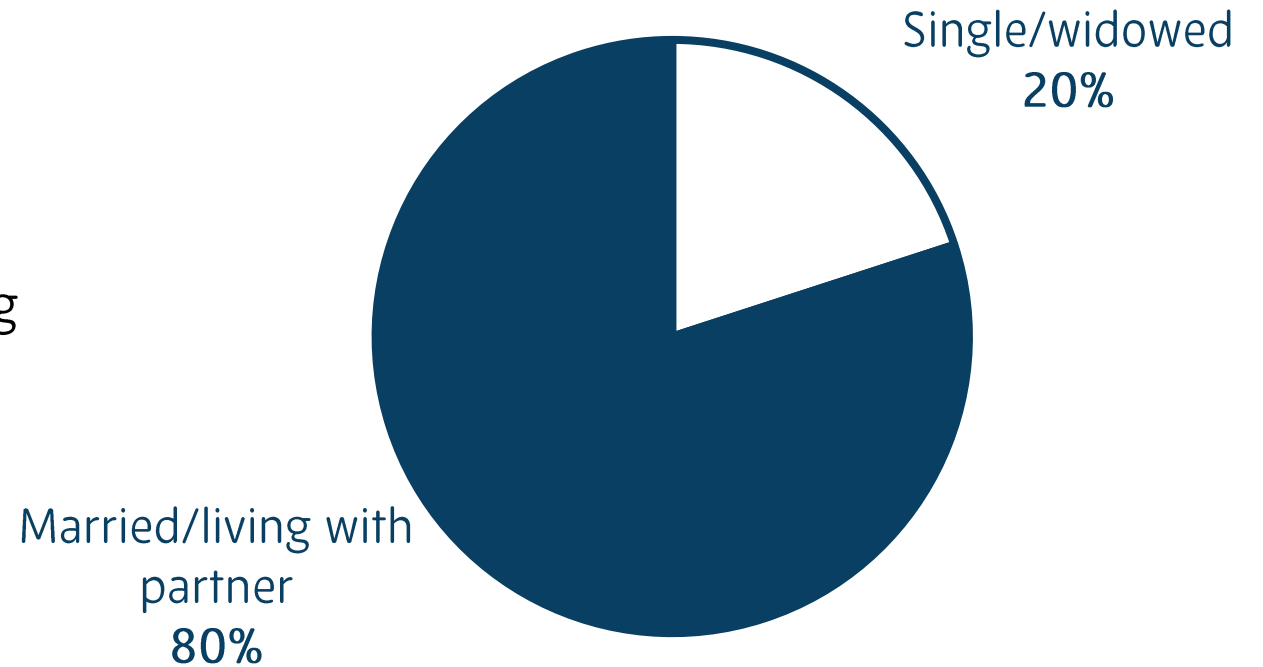
EDUCATIONAL ATTAINMENT

- » Almost **9 in 10** visitors have a college/technical school degree or higher



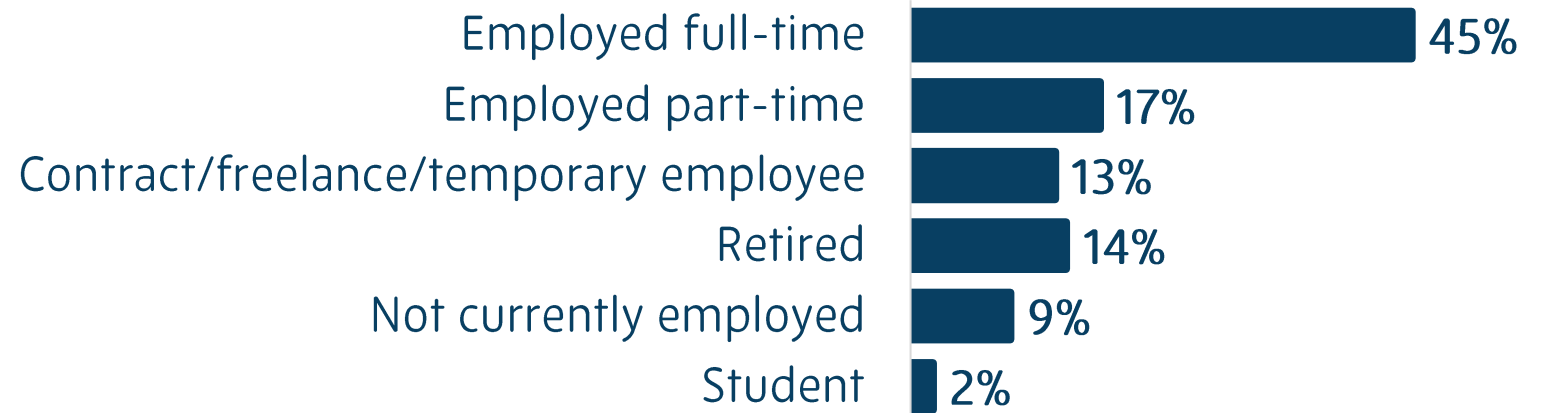
MARITAL STATUS

» 4 in 5 visitors to Maine were married or living with their partner



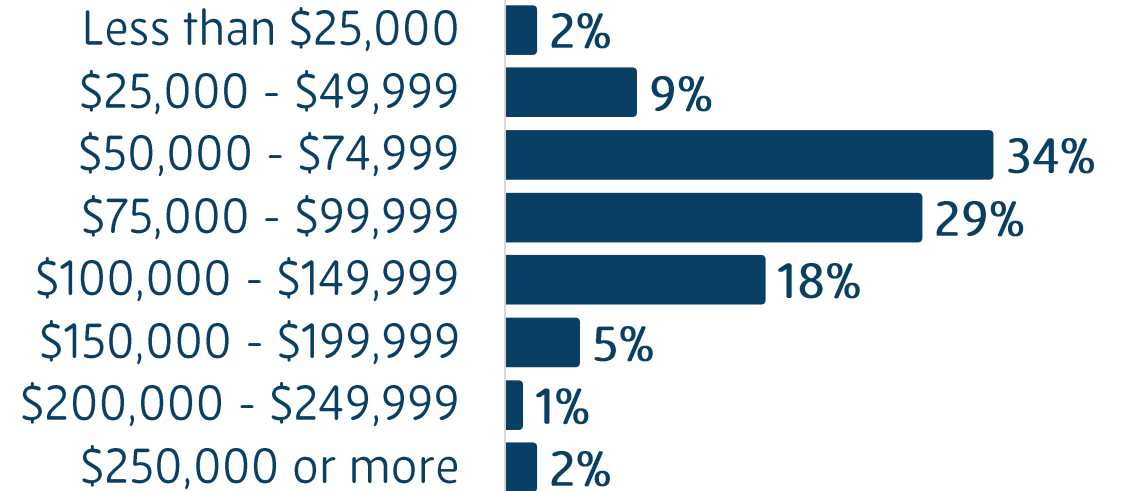
EMPLOYMENT STATUS

» 3 in 4 visitors to Maine were employed, most full-time



HOUSEHOLD INCOME

- » The average household income of visitors to Maine is **\$79,300** per year
- » **26%** of visitors to Maine earned more than \$100,000 per year



NEW & RETURNING VISITORS

- » 15% of visitors were traveling in Maine for the first time (-8% points from 2022)
- » Maine has high repeat and loyal visitors, as 25% had previously traveled in Maine more than 10 times

This is my first time



15%

2 - 5 times

32%

6 - 10 times

28%

11+ times

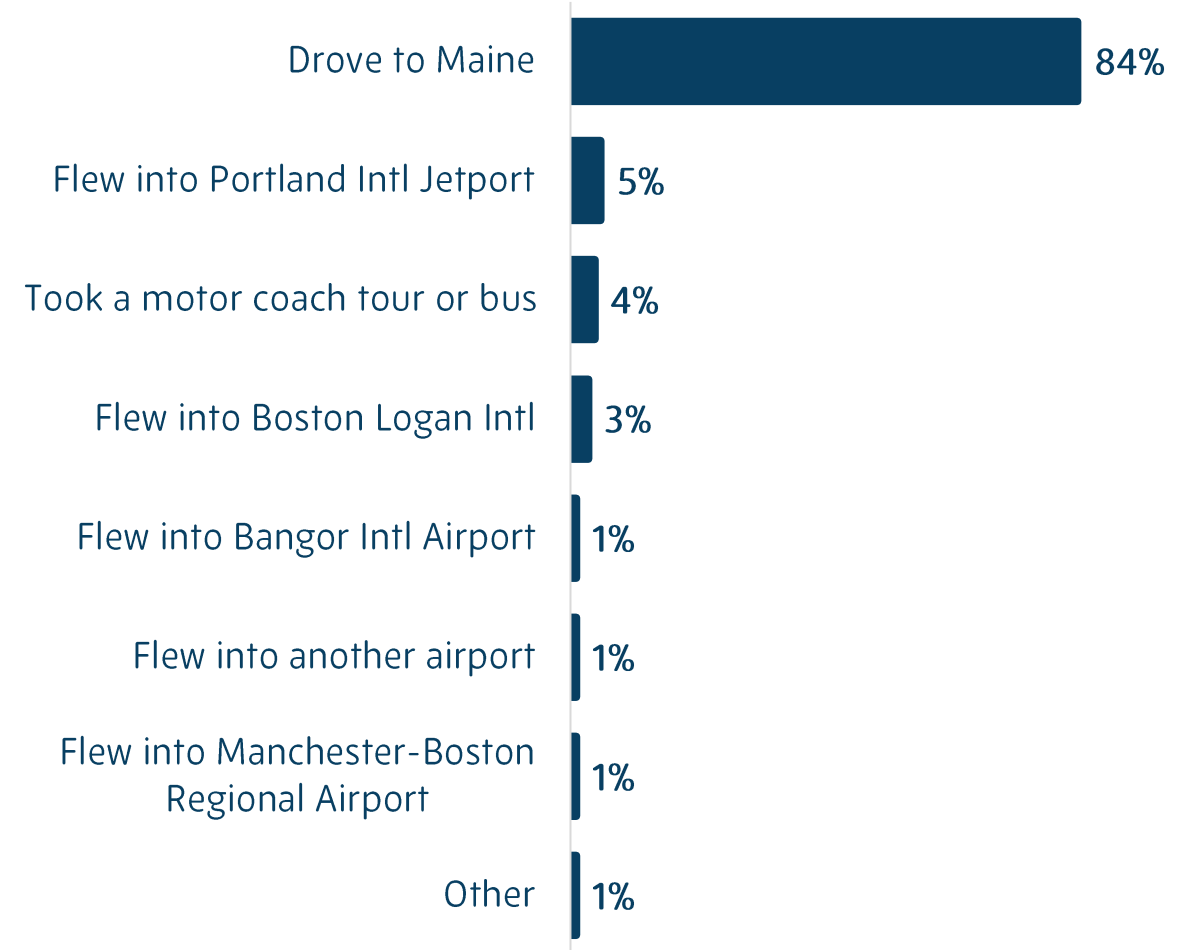
25%

VISITOR JOURNEY : TRIP EXPERIENCE



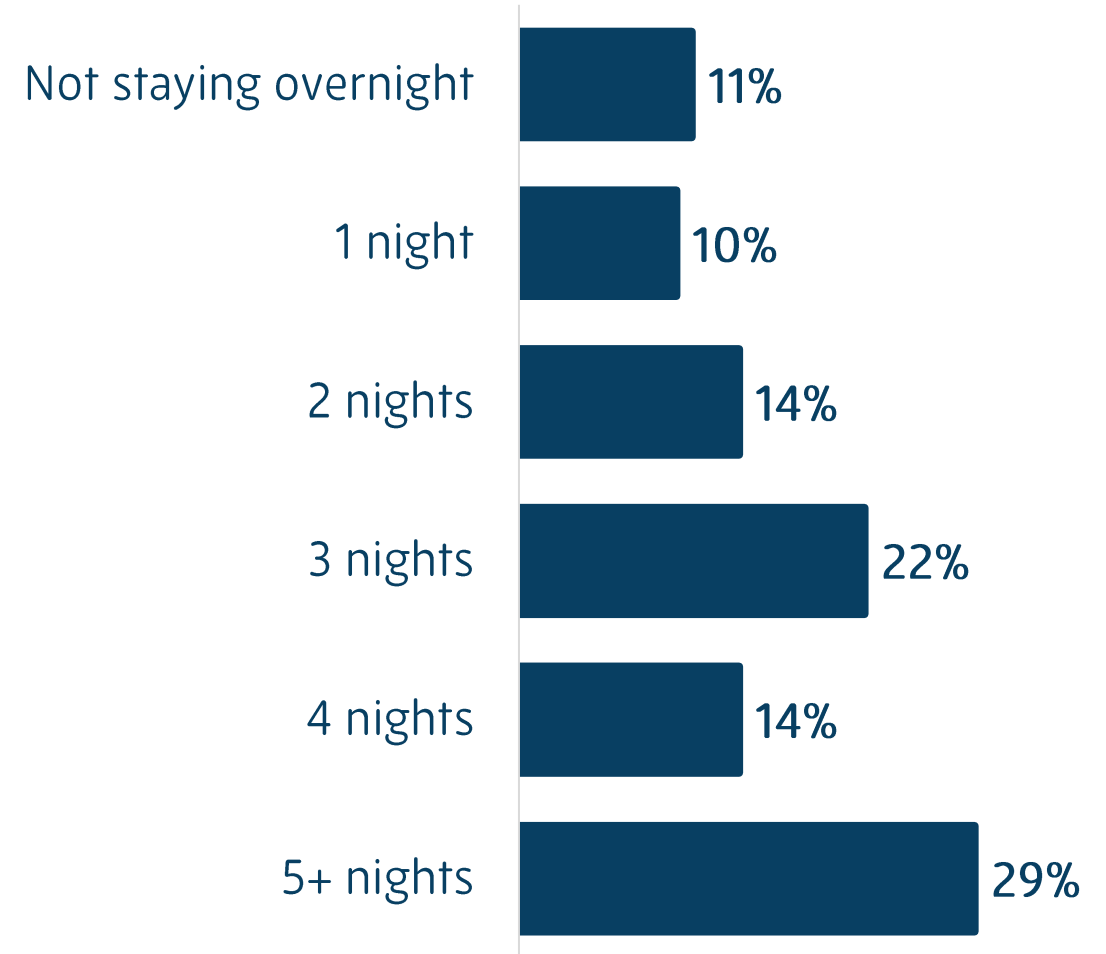
MODES OF TRANSPORTATION

- » Maine is a drive-market for most visitors, with **84%** choosing to travel by car over plane, motor coach/bus, or train
- » Most visitors who flew to Maine arrived at Portland International Jetport



NIGHTS STAYED

- » 89% of visitors stayed one or more nights in Maine on their trip
- » Typical visitors stayed 4.8* nights in Maine on their trips
- » Typical visitors staying overnight in paid accommodations stayed 4.5 nights in Maine on their trips

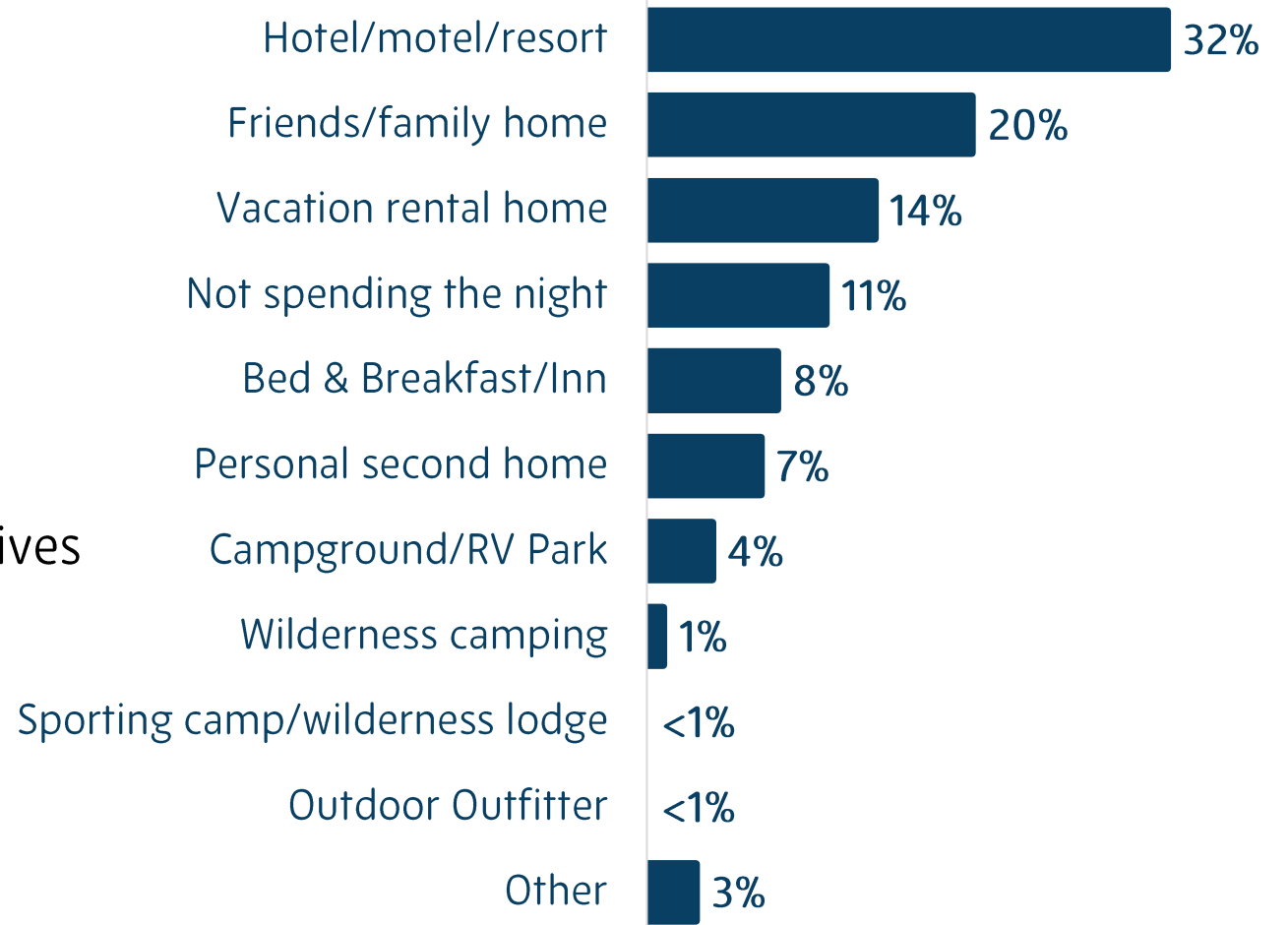


*Includes visitors staying overnight in paid accommodations, visiting friends & relatives, and day trippers.

Midcoast & Islands

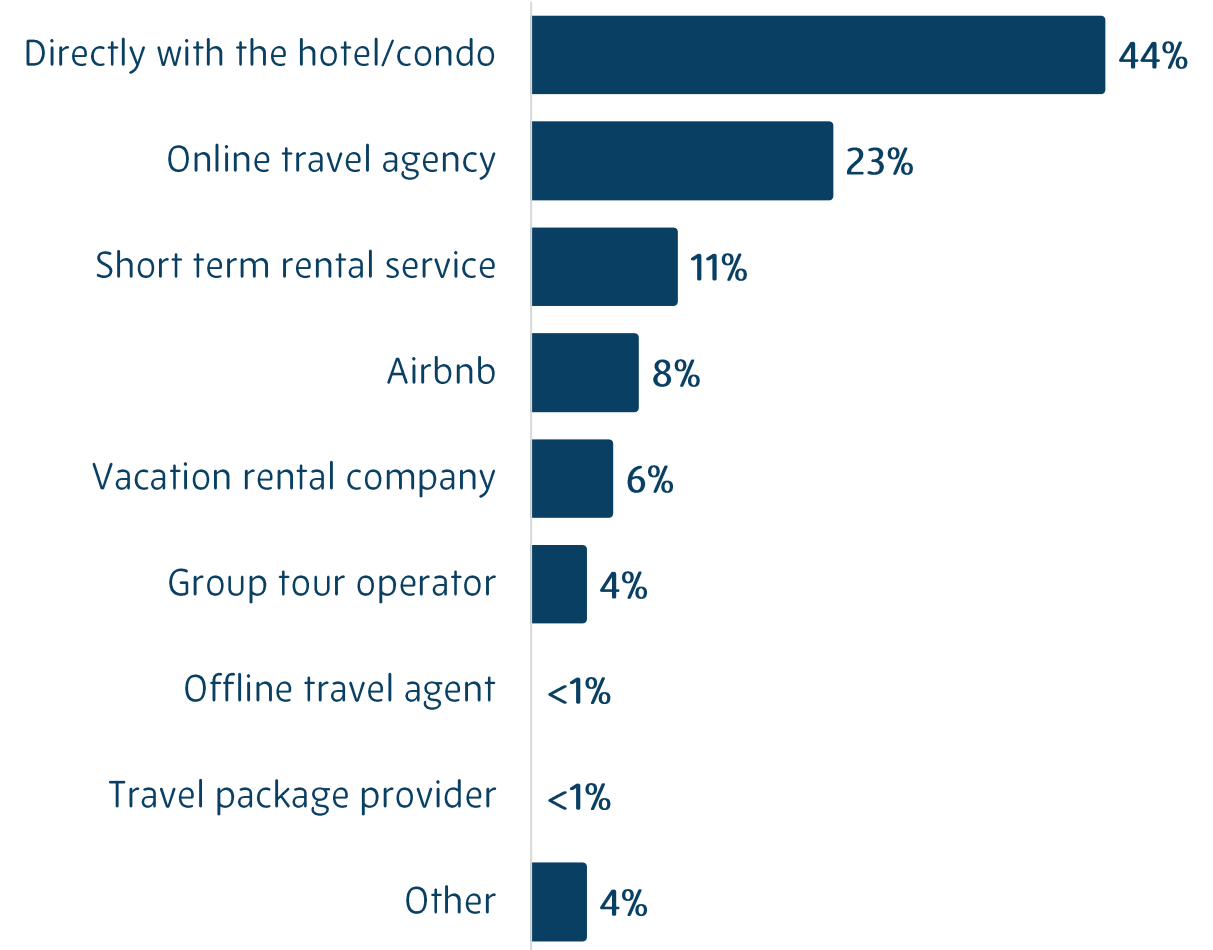
ACCOMMODATIONS

- » Nearly **1 in 3** visitors stayed in a hotel/motel/resort while in Maine
- » **1 in 5** visitors stayed with friends and relatives on their trip to Maine



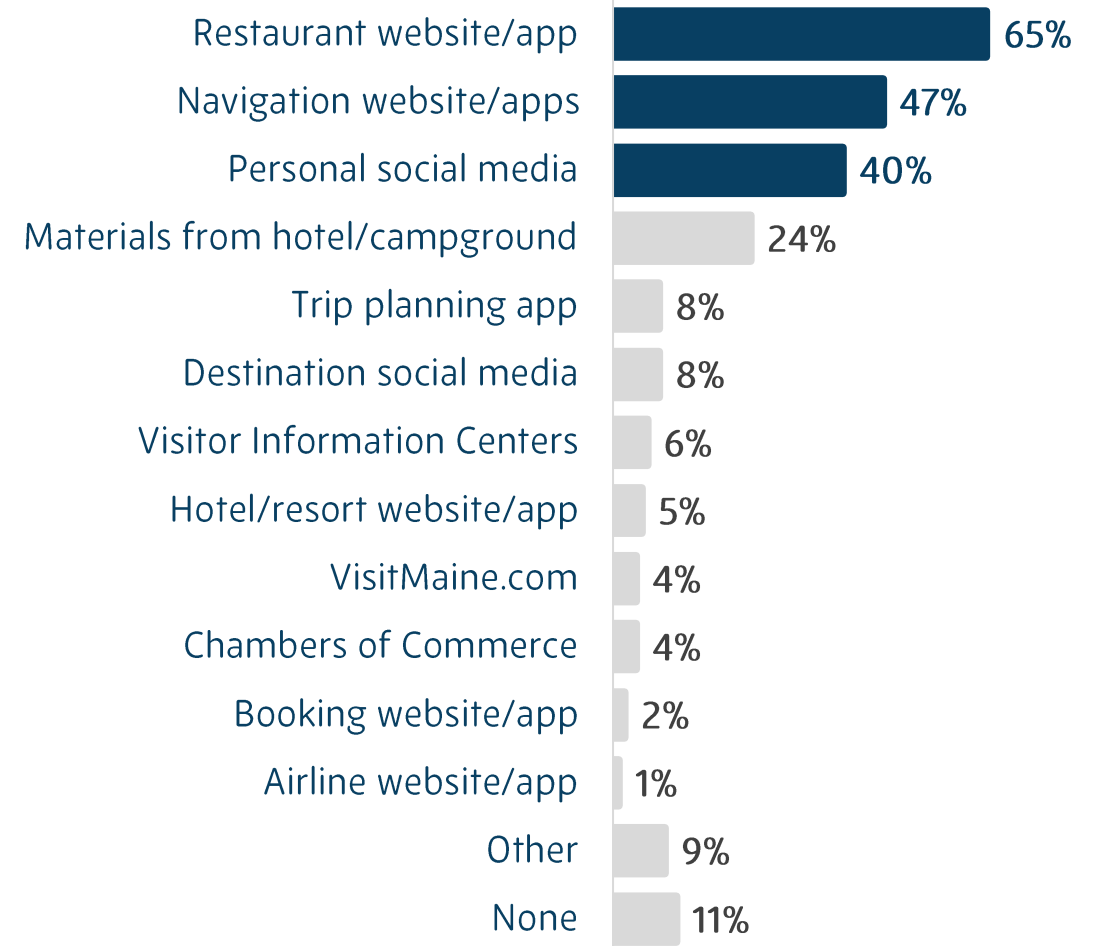
BOOKING METHODS

- » Over **2 in 5** visitors who stayed in paid accommodations during their trip booked their lodging directly with the hotel/condo



IN-MARKET VISITOR RESOURCES*

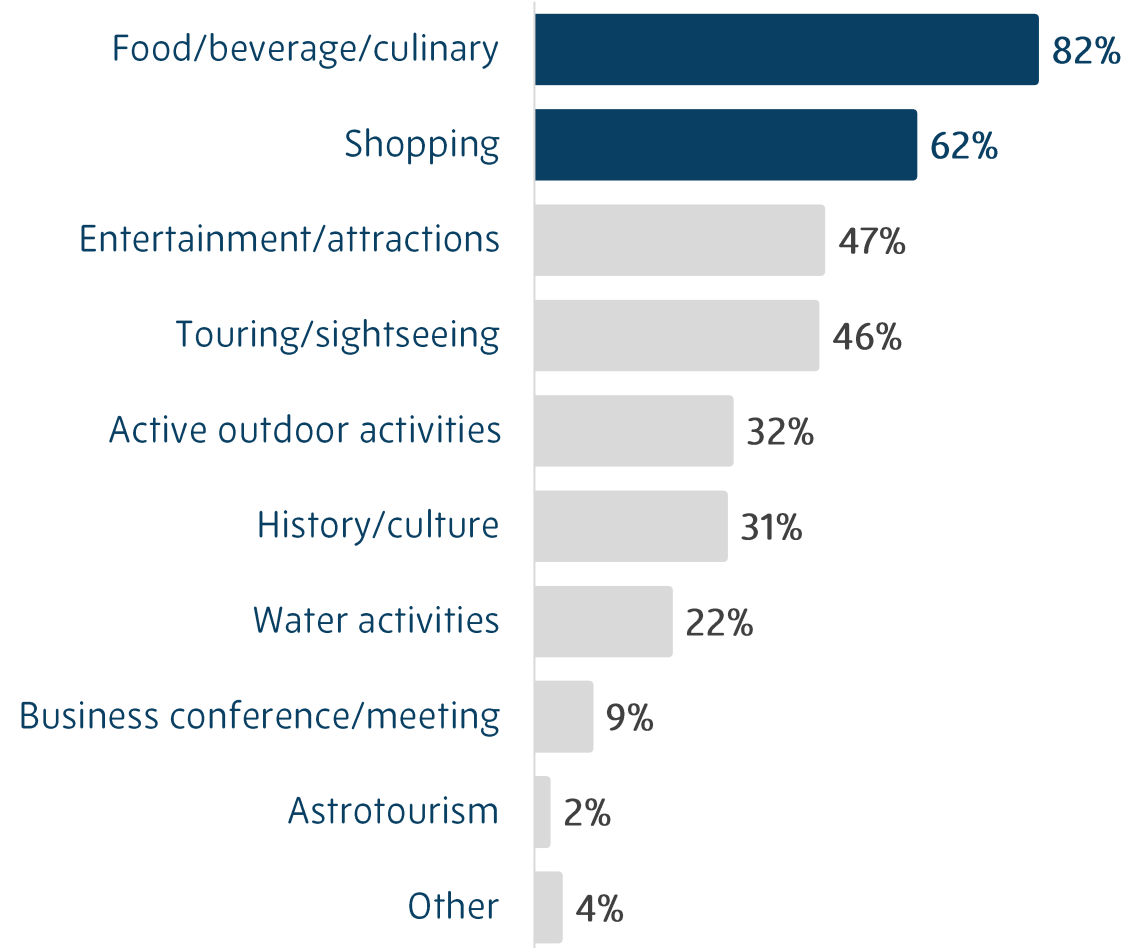
- » Visitors were most likely to rely on restaurant websites/apps (i.e., Google Maps, etc.) to plan activities in-market
- » Over **1 in 10** visitors did not use any resources to plan activities while they were in-market



*Multiple responses permitted.

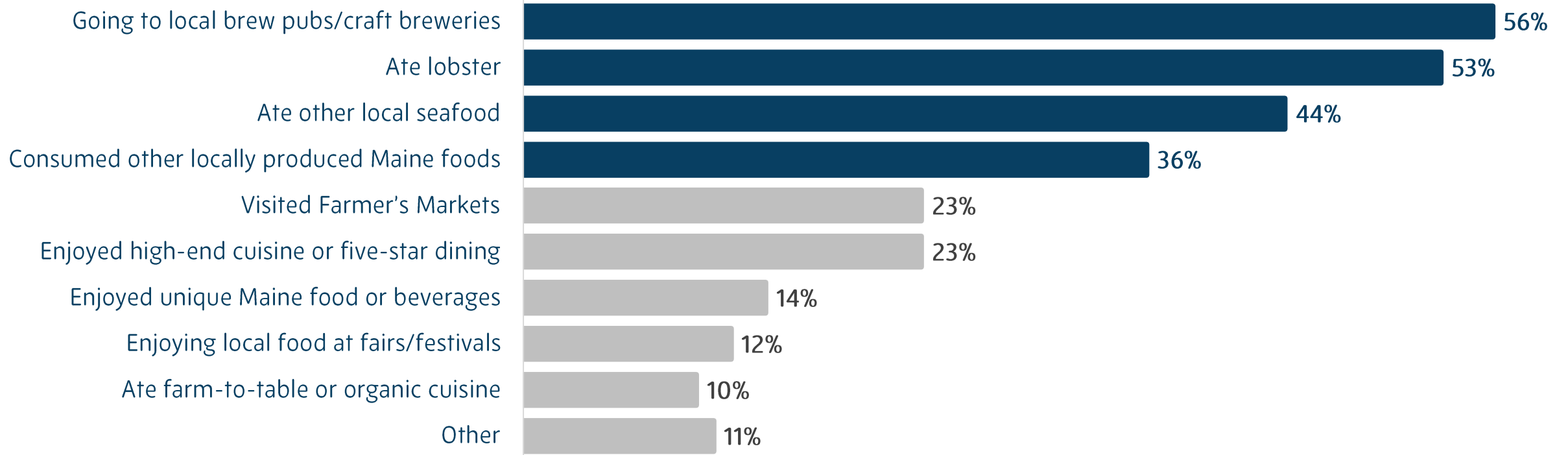
VISITOR ACTIVITIES*

- » 82% of visitors engaged in food/beverage/culinary activities during their trip to Maine
- » Over 3 in 5 visitors went shopping during their trip to Maine



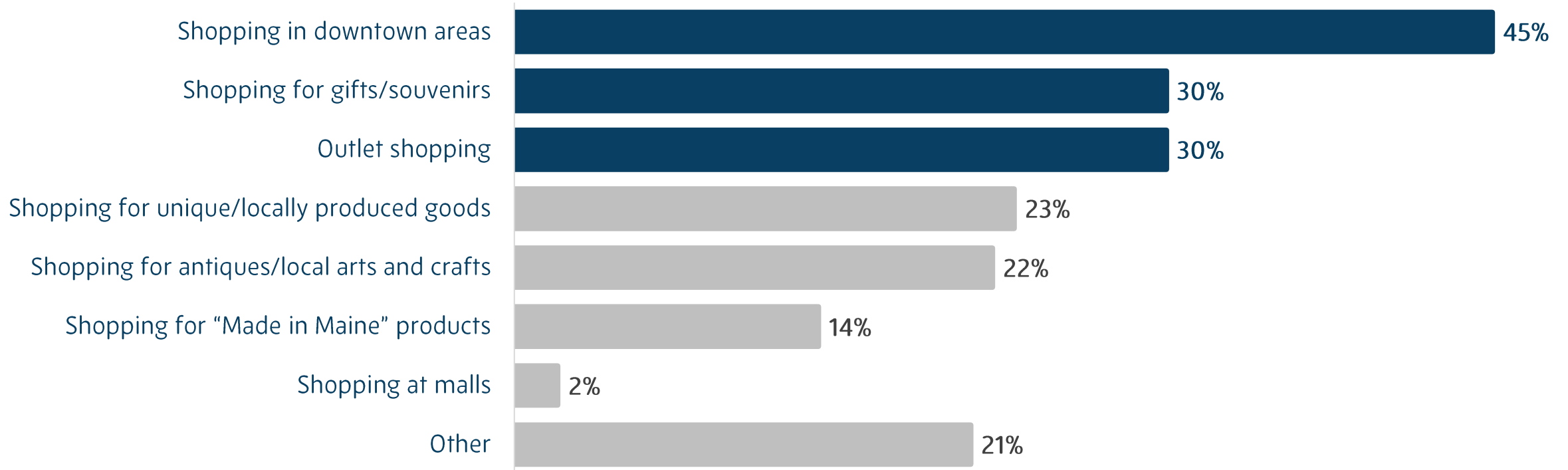
*Multiple responses permitted.

FOOD & BEVERAGE ACTIVITIES*



*Multiple responses permitted.

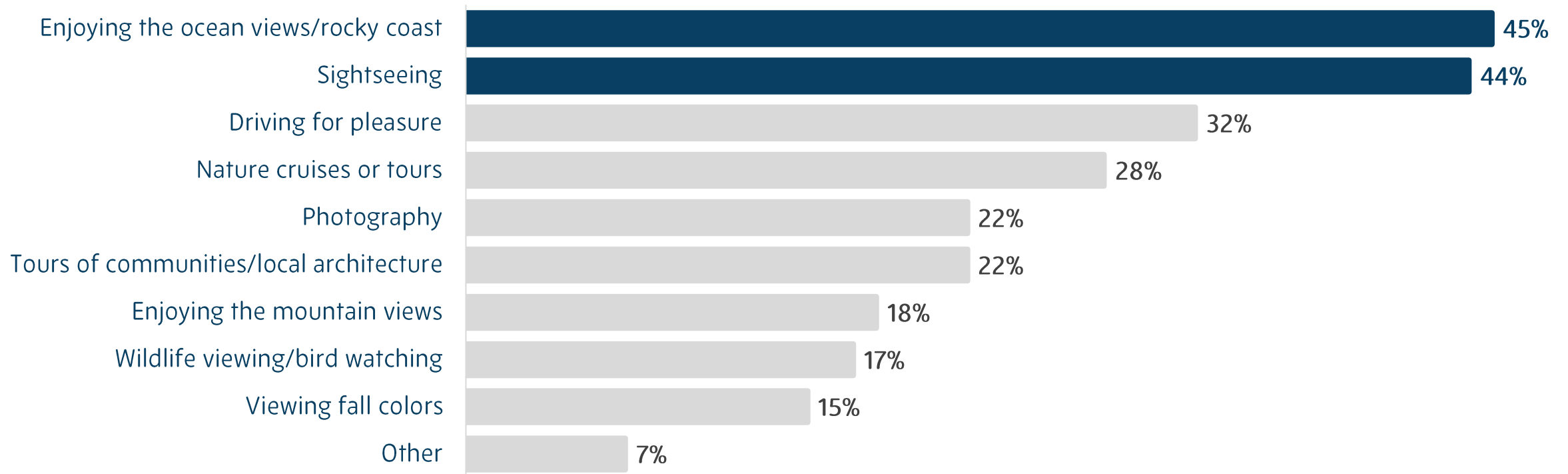
SHOPPING ACTIVITIES*



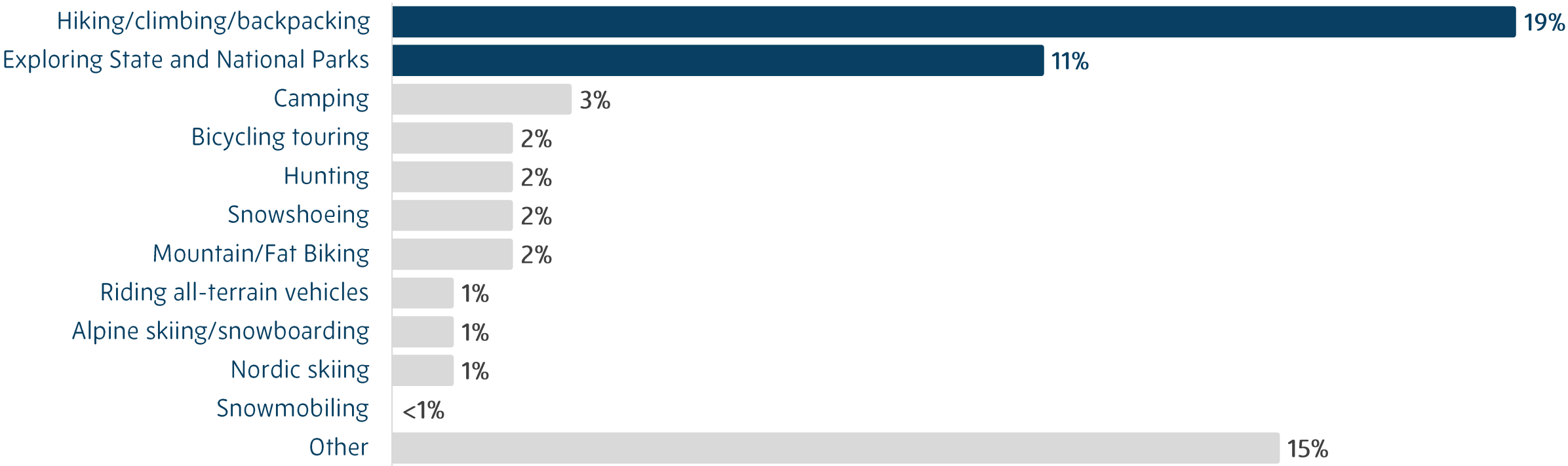
ENTERTAINMENT ACTIVITIES*



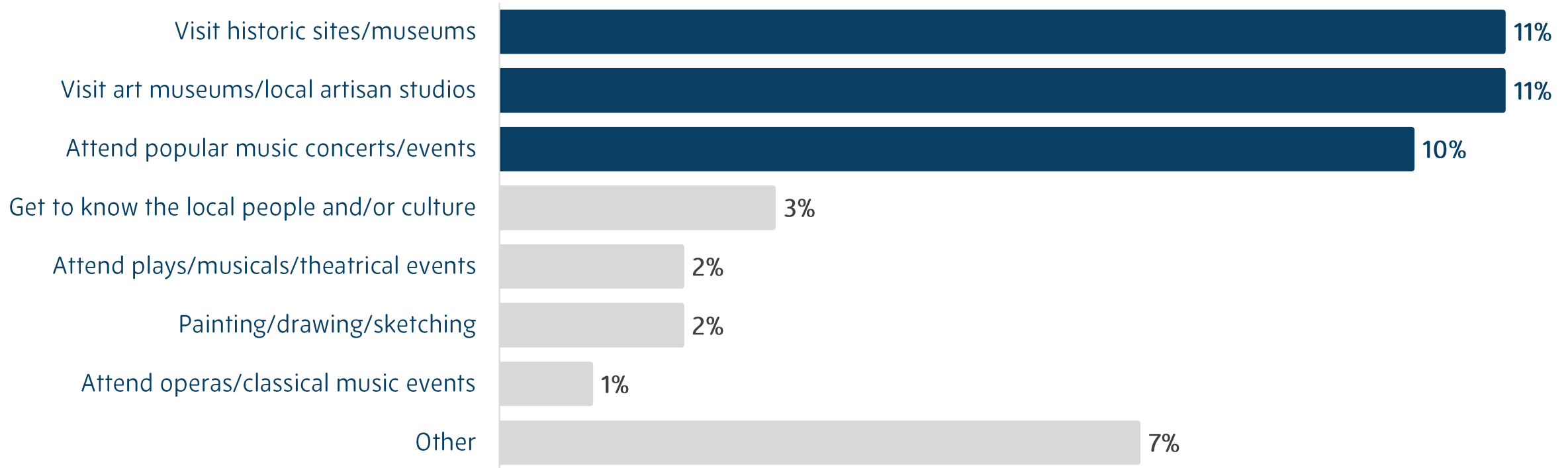
TOURING & SIGHTSEEING ACTIVITIES*



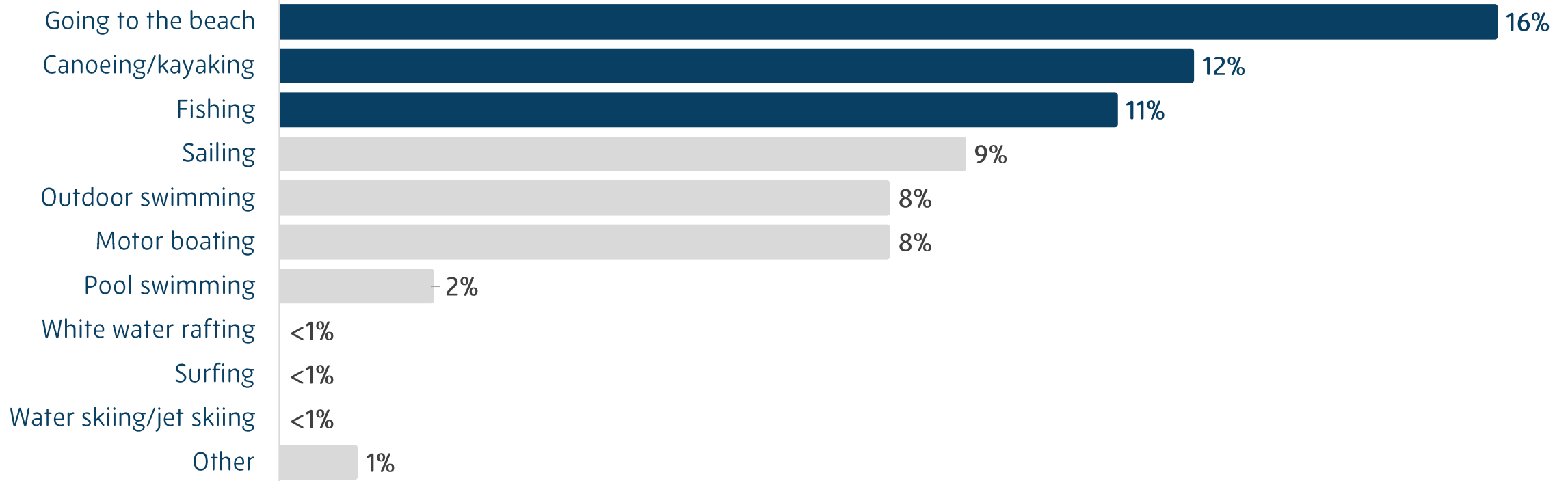
ACTIVE OUTDOOR ACTIVITIES*



HISTORICAL & CULTURAL ACTIVITIES*



WATER ACTIVITIES*



DAILY TRAVEL PARTY SPENDING

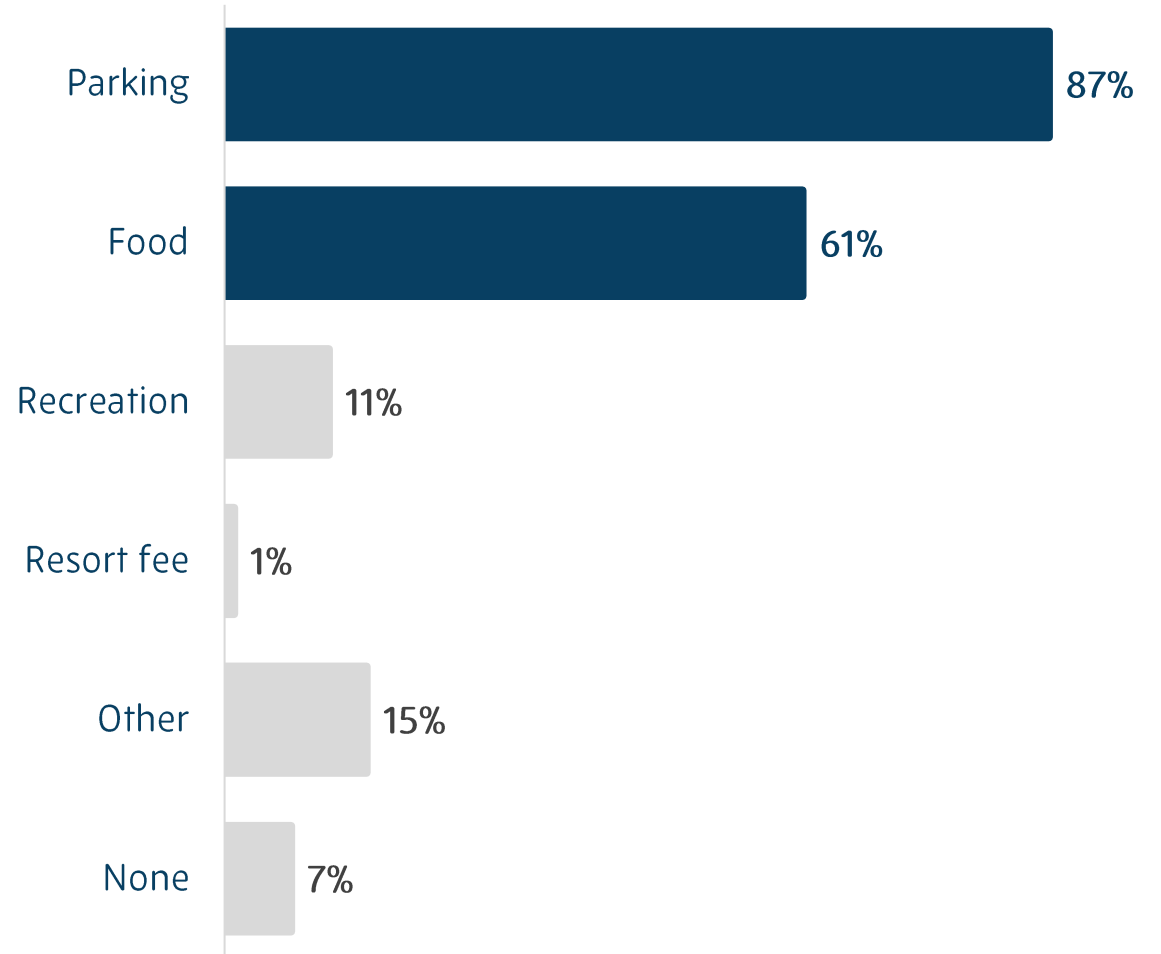
	Paid Lodging	Unpaid Lodging	Day Trippers
Accommodations	\$294	\$0	\$0
Transportation	\$33	\$30	\$35
Groceries	\$31	\$41	\$5
Restaurants	\$119	\$89	\$69
Shopping	\$115	\$92	\$90
Activities & Attractions	\$57	\$41	\$30
Other	\$5	\$6	\$2
Daily Spending	\$654	\$299	\$231

TOTAL TRAVEL PARTY SPENDING

	Paid Lodging	Unpaid Lodging	Day Trippers
Accommodations	\$1,323	\$0	\$0
Transportation	\$149	\$207	\$35
Groceries	\$140	\$283	\$5
Restaurants	\$536	\$614	\$69
Shopping	\$518	\$635	\$90
Activities & Attractions	\$257	\$283	\$30
Other	\$23	\$41	\$2
Total Spending	\$2,943	\$2,063	\$231

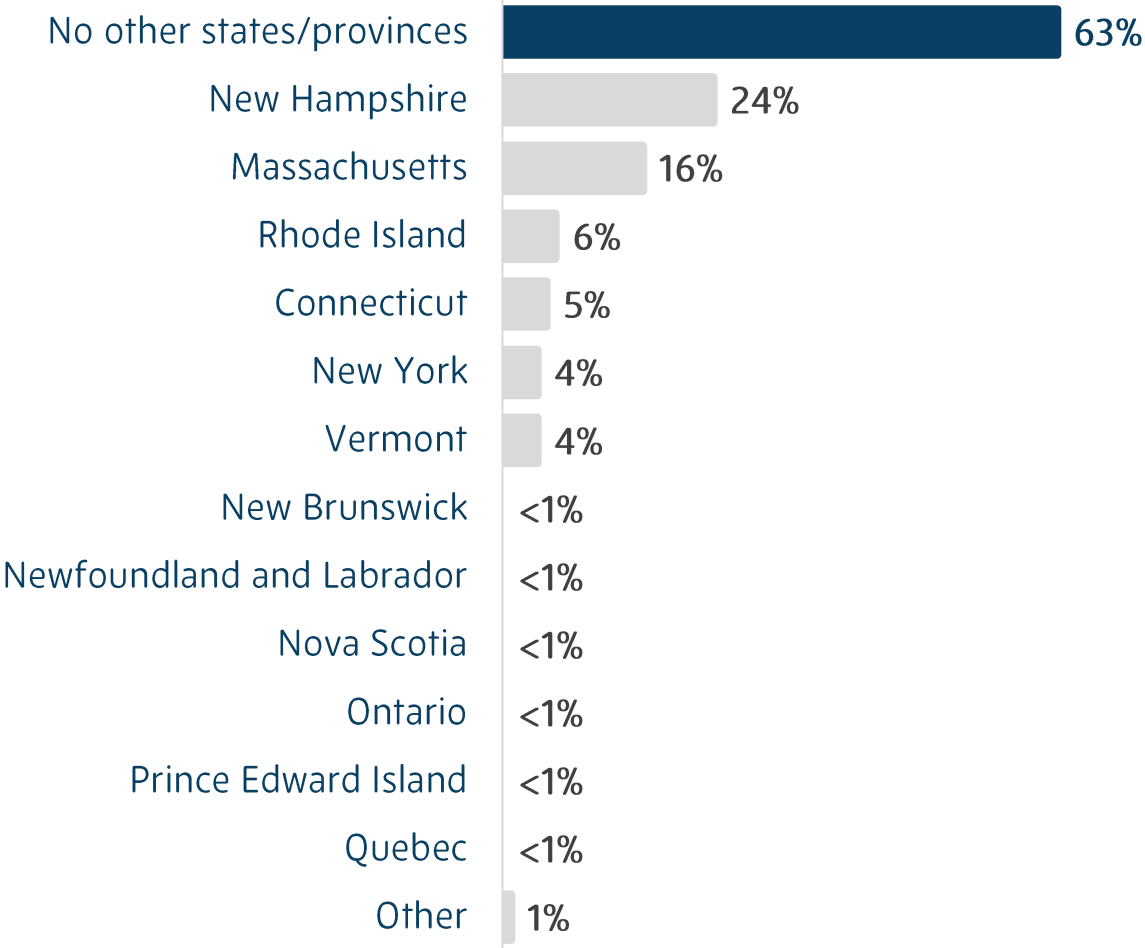
LODGING AMENITIES*

- » An amenity, e.g., food, resort fee, recreation fee, parking, etc., was included in the room price for more than **9 in 10** visitors
- » Price for accommodations included parking for nearly **9 in 10** visitors
- » Food was included in accommodations' pricing for over **3 in 5** visitors



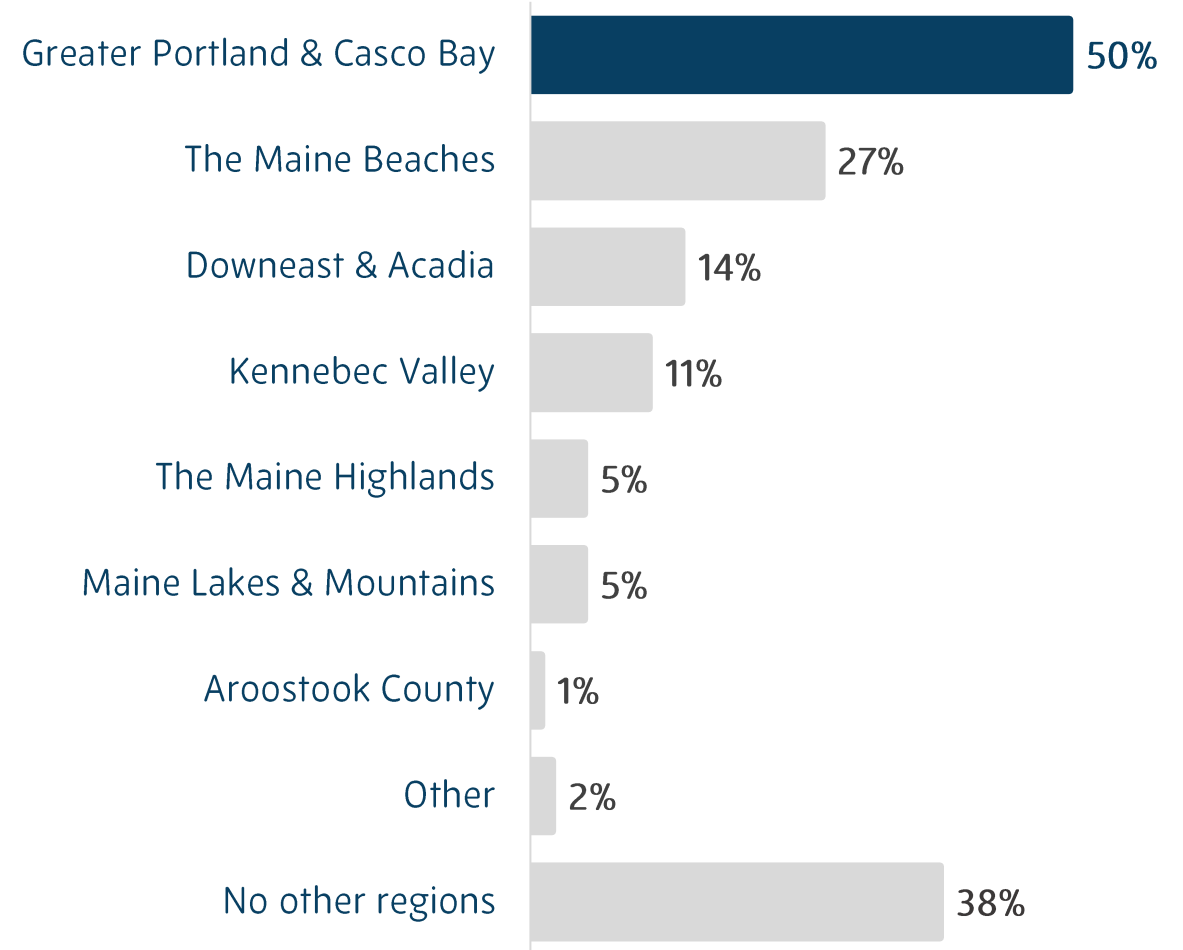
OTHER STATES & PROVINCES VISITED*

- » Nearly **2 in 3** visitors did not visit any other U.S. state or Canadian province during their trip
- » About **1 in 4** visitors also went to New Hampshire during their trip
- » Visitors were more likely to visit U.S. states near Maine than they were to visit a Canadian province during their trip



TRAVELING WITHIN MAINE*

- » **50%** of visitors visited Greater Portland & Casco Bay in addition to their primary destination within Maine
- » Nearly **2 in 5** visitors stayed within Midcoast & Islands during their trip in Maine, rather than traveling throughout the state (+10% points from 2022)



Midcoast & Islands

89

*Multiple responses permitted.

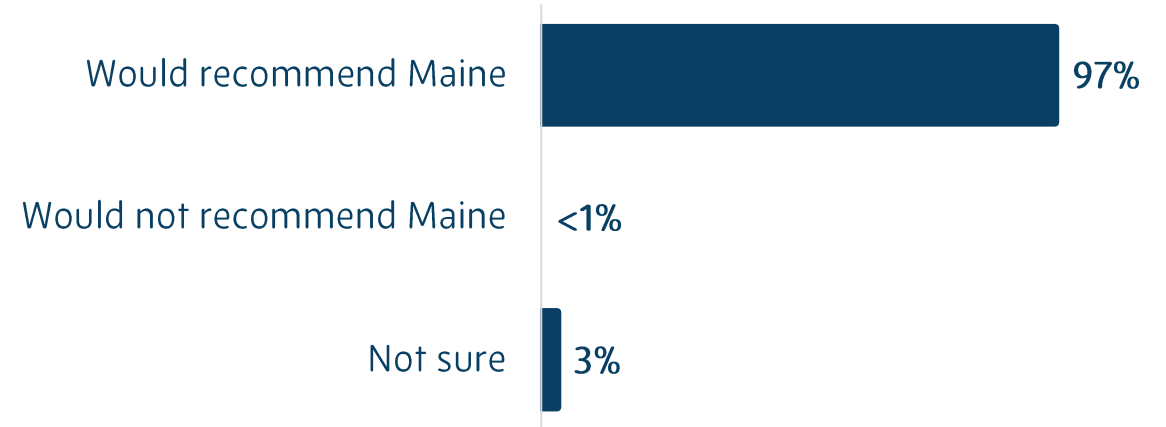
VISITOR JOURNEY : POST-TRIP EVALUATION



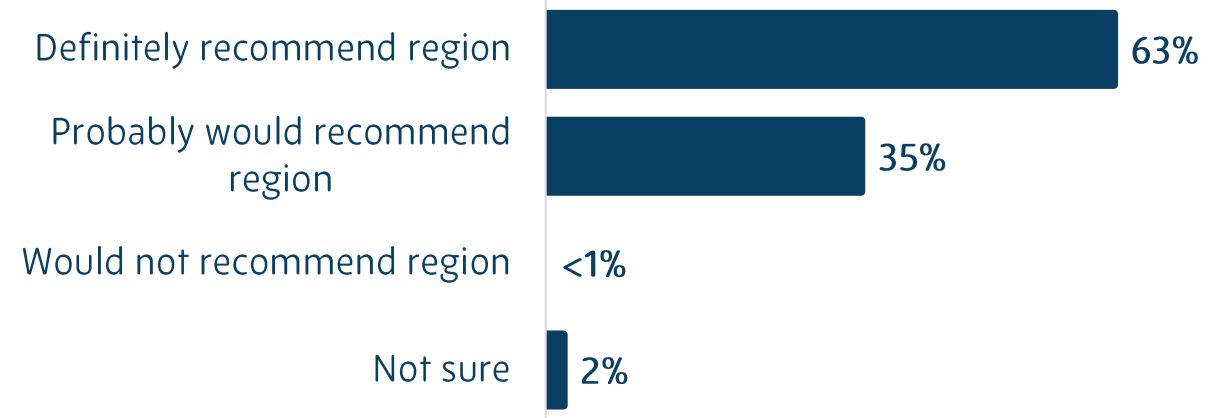
RECOMMENDING MAINE & ITS REGIONS

- » **97%** of visitors would recommend that their friends and family choose Maine as their destination for a future visit or vacation
- » **98%** of visitors would recommend that their friends and family visit the specific region of Maine that they traveled to on their trip – **63%** would definitely recommend

Likelihood of Recommending Maine

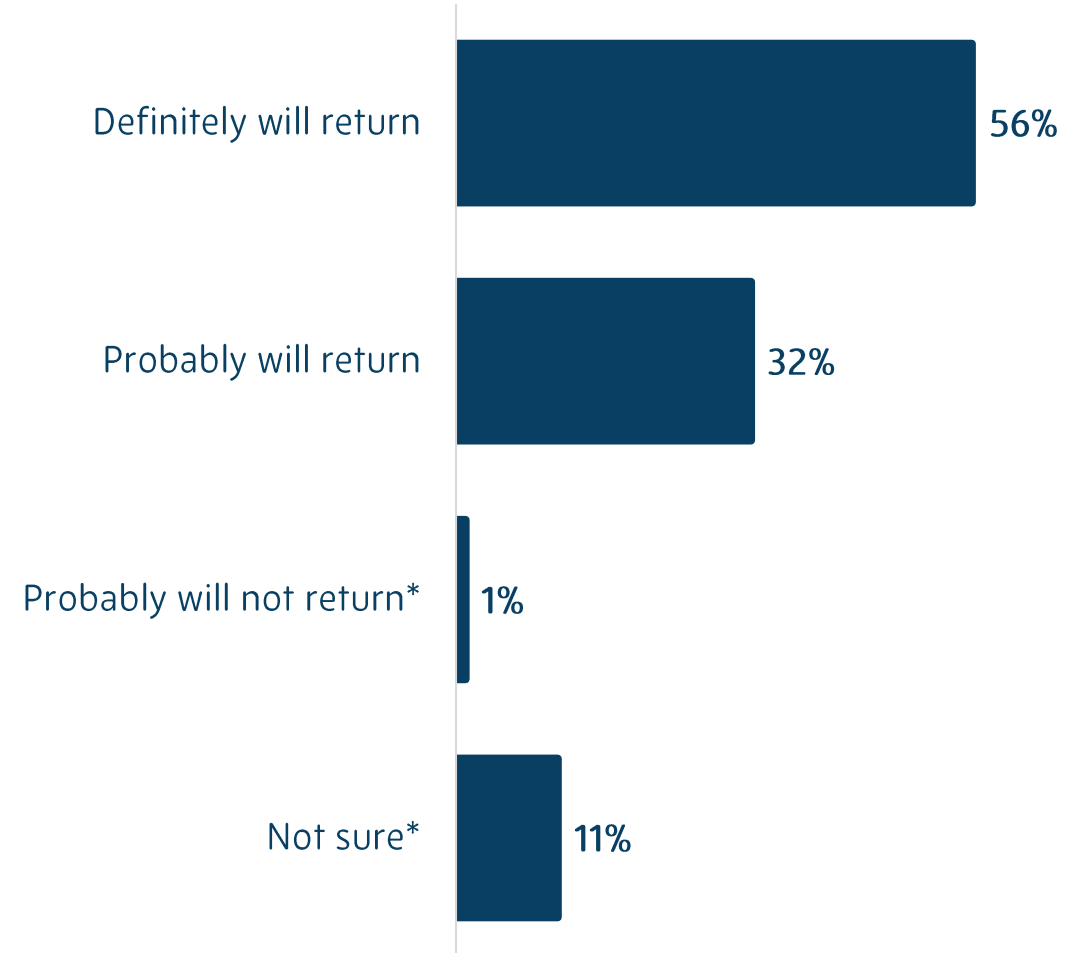


Likelihood of Recommending Region Visited



LIKELIHOOD OF RETURNING TO MAINE

» **88%** of visitors will return to Maine for a future visit or vacation (+6% points from 2022)

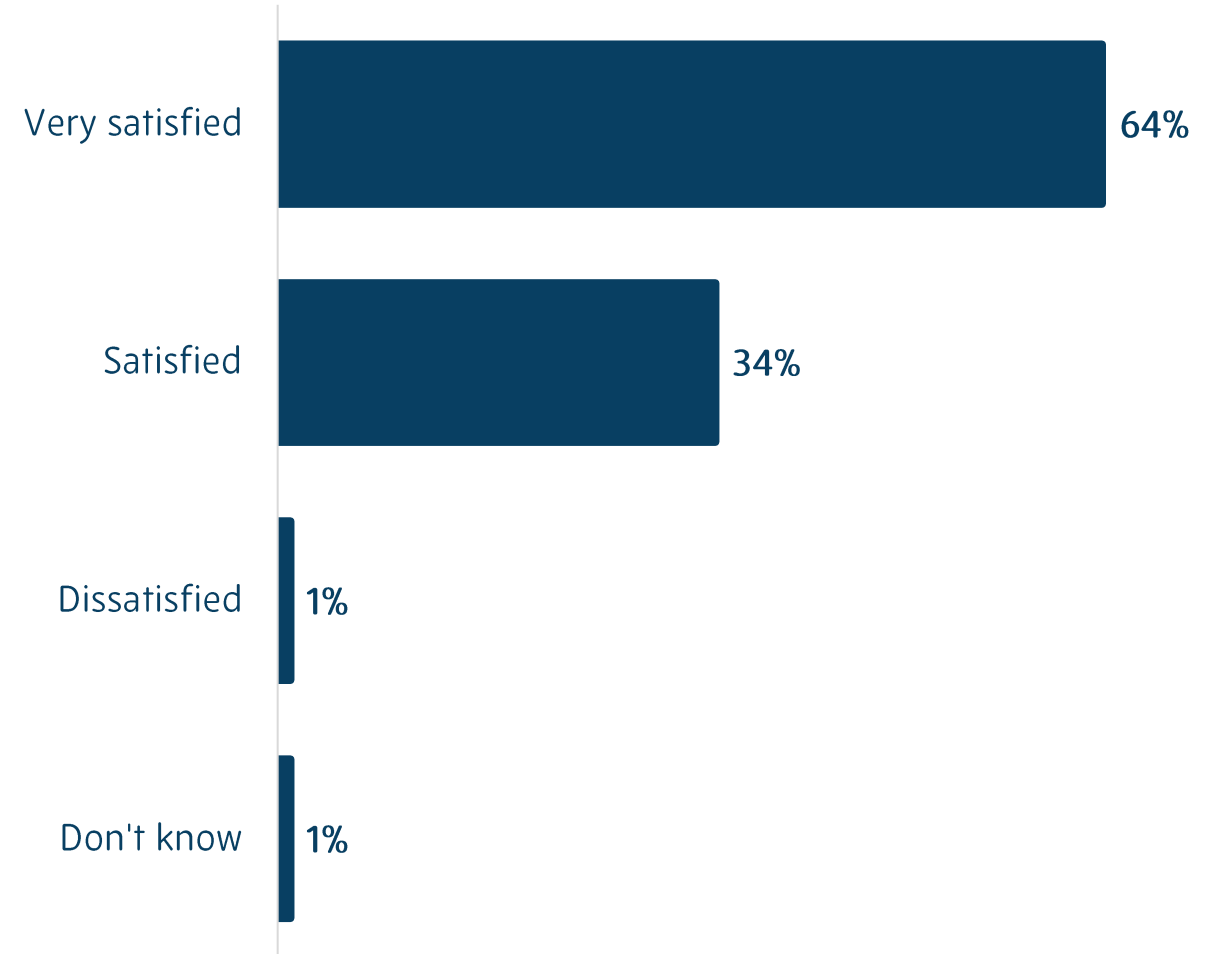


*12% of all visitors are not sure or will probably not return to Maine for the following reasons:
1. Traffic/difficult drive 2. Prefer a variety of destinations 3. Once is enough to see and do everything.

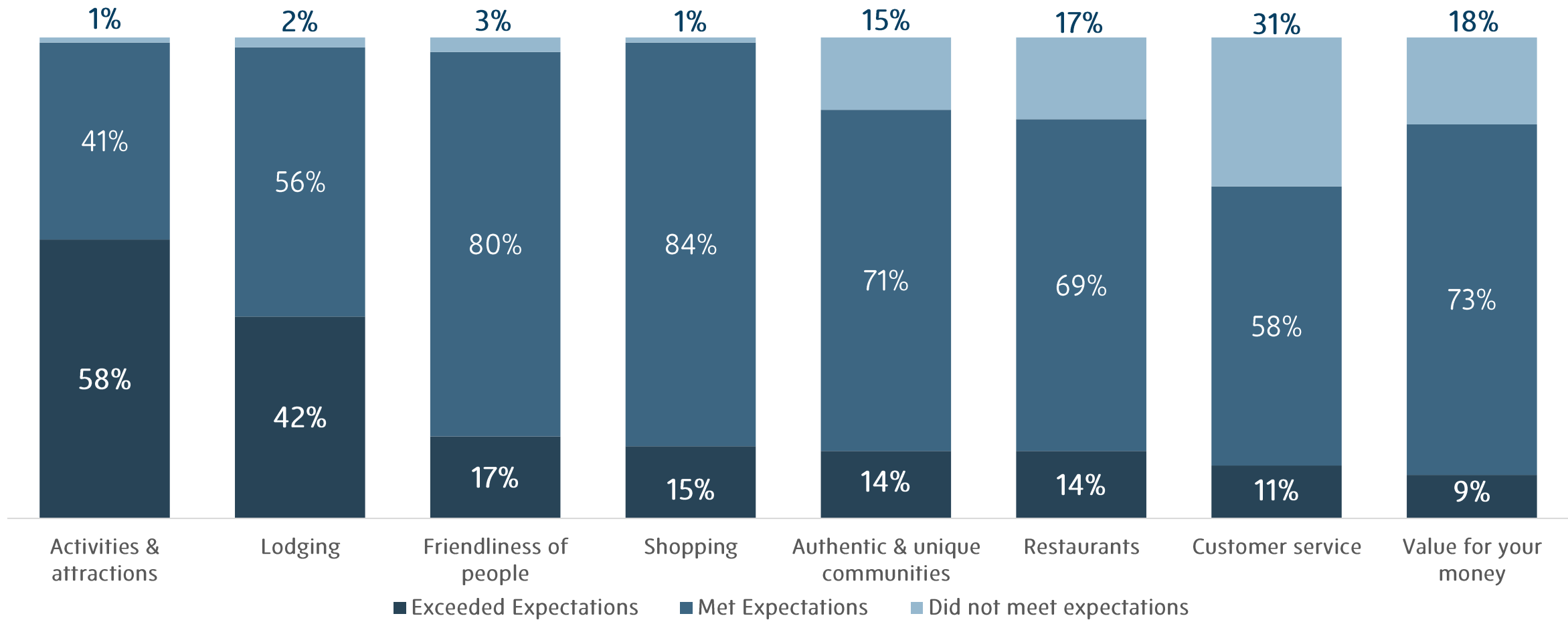
Midcoast & Islands

SATISFACTION

- » 98% of visitors were satisfied with their trip to Maine
- » 64% were very satisfied with their trip to Maine

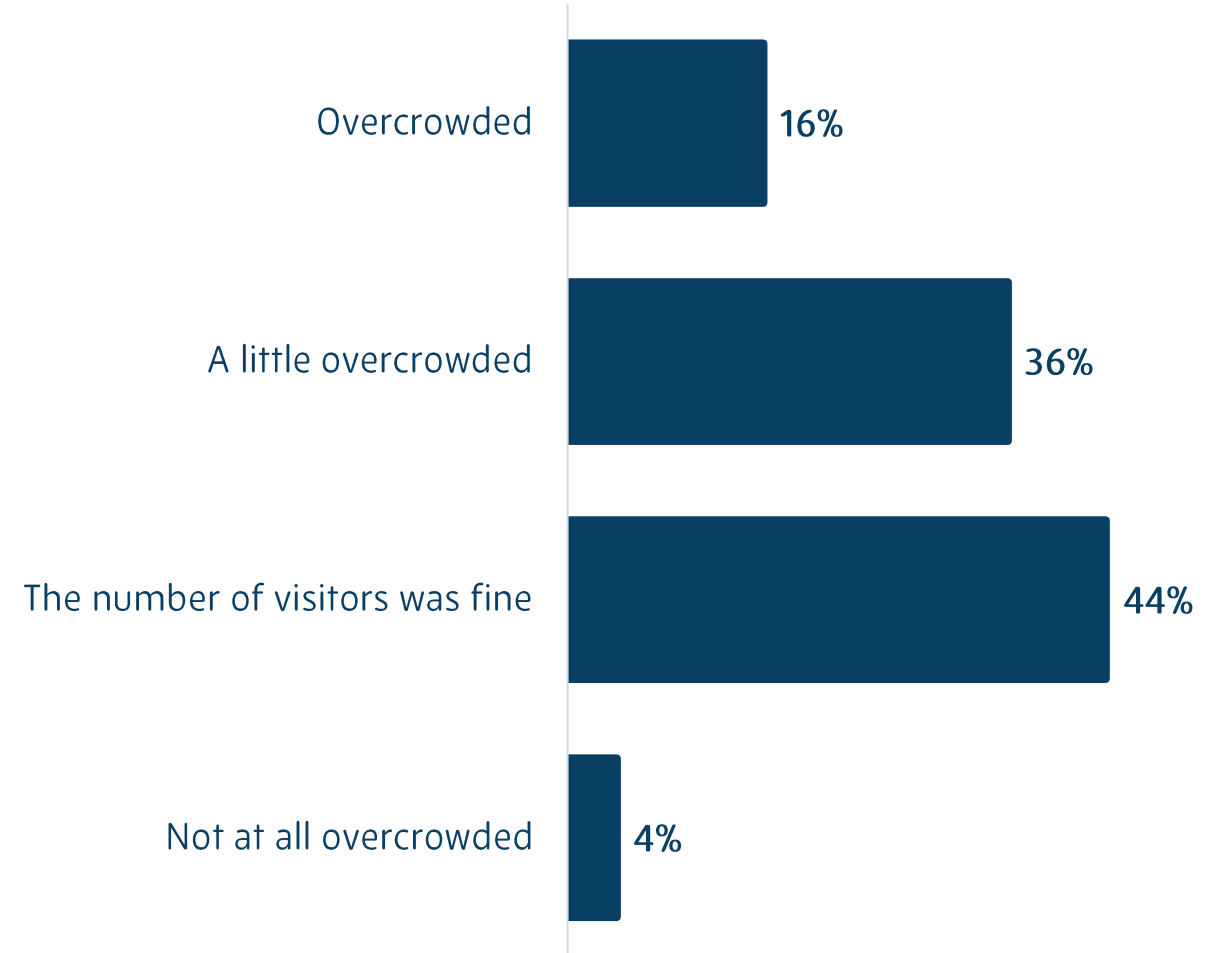


TRIP RATINGS



OVERCROWDING

- » 44% of visitors thought the number of visitors during their trip to Maine was fine
- » 36% of visitors though it was a little overcrowded



ANNUAL COMPARISONS



VISITOR JOURNEY : PRE-VISIT



TRIP PLANNING CYCLE

Trip Planning Cycle	2022	2023
A week or less	7%	8%
2 - 3 weeks	15%	16%
1 - 2 months	28%	31%
3 - 4 months	17%	16%
5 - 6 months	16%	15%
7 months - 1 year	13%	12%
More than 1 year	4%	2%
Days in Planning Cycle	60	55

Booking Window	2022	2023
A week or less	12%	12%
2 - 3 weeks	17%	18%
1 - 2 months	28%	29%
3 - 4 months	15%	14%
5 - 6 months	15%	15%
7 months - 1 year	11%	11%
More than 1 year	2%	1%
Days in Booking Window	53	51

ONLINE TRIP PLANNING SOURCES*

Online Trip Planning Sources	2022	2023
Online search engines	54%	50%
Facebook	17%	29%
Hotel websites	24%	22%
Online travel agency	13%	21%
Traveler reviews/blogs/stories	24%	19%
Instagram	17%	15%
Visit Maine social media	11%	12%
TripAdvisor	10%	11%
VRBO/HomeAway	12%	11%
VisitMaine.com	16%	10%
YouTube	8%	10%
Airbnb	10%	7%
Vacation rental websites	9%	6%
Airline websites	6%	4%
DiscoverNewEngland.com	4%	3%
MainesMidCoast.com	4%	2%
VisitPortland.com	4%	2%
MaineTourism.com	4%	2%
TheMaineHighlands.com	1%	1%
DowneastAcadia.com	3%	1%
TheMaineBeaches.com	2%	1%
MaineLakesandMountains.com	2%	1%
Twitter	1%	1%
VisitBarHarbor.com	2%	1%
VisitAroostook.com	<1%	<1%
KennebecValley.org	1%	<1%
Other	5%	4%
None	18%	21%

*Multiple responses permitted.

OTHER TRIP PLANNING SOURCES*

Other Trip Planning Sources	2022	2023
Advice from friends/family	57%	71%
Articles or travelogues	38%	35%
AAA	26%	17%
Travel planning apps	9%	8%
Travel guides/brochures	7%	4%
Called local Chambers of Commerce	5%	3%
Travel books & magazines	5%	3%
Called local convention and visitors bureaus	1%	1%
Called the Maine Office of Tourism	3%	1%
Called another Maine Tourism/Lodging Association	1%	1%
Visitor Guide	2%	1%
Visit Maine e-newsletter	2%	1%
Travel agent	2%	1%
Other	4%	3%
None	20%	19%

REASON FOR VISITING*

Reasons for Visiting	2022	2023
Visiting friends/relatives	34%	46%
Relax and unwind	27%	25%
Special occasion	19%	24%
Special event	16%	21%
Shopping	15%	20%
Sightseeing/touring	28%	20%
Attractions	16%	15%
Nature & bird watching	14%	11%
Conference/meeting	8%	9%
Culture/museums/history	7%	9%
Active outdoor activities	10%	7%
Water activities	7%	6%
Beach	5%	3%
Sporting event	2%	3%
Snow activities	1%	1%
Astrotourism	<1%	<1%
Other	5%	8%

*Multiple responses permitted.

TV SHOWS & FILM*

Trip Inspiration From Film	2022	2023
Yes	NA	3%
No	NA	97%
Don't know	NA	<1%

How Film Inspired Trip**	2022	2023
Visiting a location of a TV show or film was one of the activities I engaged in while in Maine	NA	83%
Seeing Maine in a film or TV show made me think about Maine as a place to visit	NA	7%
Visiting a location related to a TV show or film was the main reason I visited Maine	NA	3%
Maine was a destination option and visiting a location related to a TV show or film was the deciding factor	NA	<1%
Something else	NA	7%

Visited TV or Film Attractions***	2022	2023
Yes	NA	12%
No	NA	87%
Don't know	NA	1%

*Questions were not asked until January 2023.

**Only asked to those who said a TV show or film inspired them to take a trip to Maine.

***Only asked to those who said they were NOT inspired by a TV show or film to visit Maine.

OTHER STATES/PROVINCES CONSIDERED*

Other States/Provinces Considered	2022	2023
No other states/provinces	57%	51%
New Hampshire	27%	32%
Massachusetts	18%	20%
Rhode Island	10%	8%
Vermont	10%	7%
Connecticut	5%	6%
New York	7%	5%
New Brunswick	1%	1%
Nova Scotia	1%	1%
Prince Edward Island	1%	1%
Quebec	1%	1%
Newfoundland and Labrador	1%	<1%
Ontario	1%	<1%
Other	2%	1%

ADVERTISING/PROMOTIONS

Recalled Advertising	2022	2023
Yes	73%	66%
No	17%	21%
Not sure	10%	13%

Influenced by Advertising	2022	2023
Yes	51%	40%

ADVERTISING/PROMOTIONS*

Sources of Advertising Recalled*	2022	2023
Social media	45%	56%
Internet	39%	34%
Magazine	24%	30%
Radio	15%	22%
AAA	10%	11%
Newspaper	8%	10%
VisitMaine.com	7%	6%
Traveler reviews/blogs	8%	5%
Cable or satellite television	6%	5%
Online streaming service	3%	3%
Maine travel/visitor guide	4%	2%
Deal – based promotion	2%	2%
Brochure	3%	2%
Billboard	2%	1%
Music/podcast streaming	2%	1%
Other	1%	1%
Not sure	1%	1%

VISITOR JOURNEY : TRAVELER PROFILE



ORIGIN REGION

Region of Origin	2022	2023
Maine	18%	27%
New England	32%	32%
Mid-Atlantic	23%	21%
Southeast	10%	8%
Southwest	3%	3%
Midwest	7%	5%
West	4%	2%
Canada	2%	1%
International	1%	1%

ORIGIN STATE/PROVINCE

Origin States & Provinces	2022	2023
Maine	18%	27%
Massachusetts	14%	15%
New Hampshire	8%	8%
New York	8%	8%
Connecticut	7%	7%
New Jersey	5%	5%
Florida	4%	4%
Pennsylvania	4%	3%
Maryland	2%	2%
Rhode Island	2%	2%
Virginia	3%	2%

ORIGIN MARKET

Origin Markets	2022	2023
Boston	9%	9%
New York City ¹	9%	8%
Portland	2%	4%
Augusta	2%	3%
Washington DC - Baltimore ²	4%	3%
Auburn - Lewiston	2%	3%
Waterville	2%	2%
Belfast	1%	2%
Philadelphia	2%	2%
Providence, RI	2%	2%

¹Includes some markets in New Jersey, Pennsylvania, and Connecticut.

²Includes some markets in Maryland, Virginia, and West Virginia.

TRAVEL PARTY SIZE/COMPOSITION

Travel Party Composition	2022	2023
As a couple	51%	46%
As a family	21%	19%
Traveled alone	13%	14%
With other couples/friends	11%	13%
In a tour group	2%	4%
With business associates	2%	4%
Other	<1%	<1%
Average Travel Party Size	3.0	2.9

TRAVEL WITH CHILDREN*

Children in Travel Party*	2022	2023
No children	86%	87%
Children younger than 6	5%	5%
Children 6 – 12	7%	8%
Children 13 – 17	6%	4%

Gender	2022	2023
Male	40%	45%
Female	60%	55%

DEMOGRAPHIC PROFILE

Age	2022	2023
Under 25	2%	2%
25 – 34	11%	9%
35 – 44	26%	24%
45 – 54	21%	22%
55 – 65	30%	31%
Over 65	10%	12%
Median Age	50	52

Race/Ethnicity	2022	2023
White	86%	89%
Black	4%	3%
Asian	3%	3%
Hispanic	2%	1%
Indigenous	<1%	<1%
Other	5%	4%

LIFESTYLE PROFILE

Marital Status	2022	2023
Single/widowed	20%	20%
Married/living with partner	80%	80%

Employment Status	2022	2023
Employed full-time	42%	45%
Employed part-time	19%	17%
Contract/freelance/temporary employee	13%	13%
Retired	13%	14%
Not currently employed	10%	9%
Student	3%	2%

LIFESTYLE PROFILE

Household Income	2022	2023
Less than \$25,000	3%	2%
\$25,000 - \$49,999	8%	9%
\$50,000 - \$74,999	30%	34%
\$75,000 - \$99,999	26%	29%
\$100,000 - \$149,999	21%	18%
\$150,000 - \$199,999	7%	5%
\$200,000 - \$249,999	2%	1%
\$250,000 or more	3%	2%
Median Household Income	\$83,700	\$79,300

LIFESTYLE PROFILE

Educational Attainment	2022	2023
High school or less	3%	2%
Some college or technical school	14%	12%
College or technical school graduate	70%	77%
Graduate school	13%	9%

NEW & RETURNING VISITORS

Previous Trips to Maine	2022	2023
This is my first time	23%	15%
2 - 5 times	34%	32%
6 - 10 times	24%	28%
11+ times	19%	25%

VISITOR JOURNEY : TRIP EXPERIENCE



TRANSPORTATION

Means of Transportation	2022	2023
Drove to Maine	82%	84%
Flew into Portland Intl Jetport	7%	5%
Took a motor coach tour or bus	3%	4%
Flew into Boston Logan Intl	4%	3%
Flew into Bangor Intl Airport	1%	1%
Flew into Manchester-Boston Regional Airport	1%	1%
Flew into another airport	1%	1%
Other	1%	1%

LENGTH OF STAY

Nights Stayed	2022	2023
Not staying overnight	14%	11%
1 night	4%	10%
2 nights	10%	14%
3 nights	19%	22%
4 nights	17%	14%
5+ nights	36%	29%
Average Length of Stay	5.0	4.8

ACCOMMODATIONS

Accommodations	2022	2023
Hotel/motel/resort	29%	32%
Friends/family home	19%	20%
Vacation rental home	14%	14%
Not spending the night	14%	11%
Bed & Breakfast/Inn	7%	8%
Personal second home	7%	7%
Campground/RV Park	5%	4%
Wilderness camping	2%	1%
Sporting camp/wilderness lodge	1%	<1%
Outdoor Outfitter	<1%	<1%
Other	2%	3%

BOOKING

Booking Methods	2022	2023
Directly with the hotel/condo	43%	44%
Online travel agency	21%	23%
Short term rental service	10%	11%
Airbnb	10%	8%
Vacation rental company	6%	6%
Group tour operator	3%	4%
Offline travel agent	1%	<1%
Travel package provider	1%	<1%
Other	5%	4%

IN-MARKET RESOURCES*

In-Market Resources	2022	2023
Restaurant website/app	54%	65%
Navigation website/apps	59%	47%
Personal social media	35%	40%
Materials from hotel/campground	23%	24%
Trip planning app	9%	8%
Destination social media	10%	8%
Visitor Information Centers	13%	6%
Hotel/resort website/app	8%	5%
VisitMaine.com	8%	4%
Chambers of Commerce	8%	4%
Booking website/app	3%	2%
Airline website/app	2%	1%
Other	9%	9%
None	10%	11%

ACTIVITIES*

Activities	2022	2023
Food/beverage/culinary	88%	82%
Shopping	57%	62%
Entertainment/attractions	42%	47%
Touring/sightseeing	51%	46%
Active outdoor activities	38%	32%
History/culture	23%	31%
Water activities	25%	22%
Business conference/meeting	8%	9%
Astrotourism	3%	2%
Other	4%	4%

FOOD & BEVERAGE ACTIVITIES*

Food & Beverage Activities	2022	2023
Going to local brew pubs/craft breweries	57%	56%
Ate lobster	57%	53%
Ate other local seafood	40%	44%
Consumed other locally produced Maine foods	37%	36%
Visited Farmer's Markets	19%	23%
Enjoyed high-end cuisine or five-star dining	24%	23%
Enjoyed unique Maine food or beverages	20%	14%
Enjoying local food at fairs/festivals	18%	12%
Ate farm-to-table or organic cuisine	11%	10%
Other	7%	11%

SHOPPING ACTIVITIES*

Shopping Activities	2022	2023
Shopping in downtown areas	34%	45%
Shopping for gifts/souvenirs	32%	30%
Outlet shopping	29%	30%
Shopping for unique/locally produced goods	28%	23%
Shopping for antiques/local arts and crafts	25%	22%
Shopping for “Made in Maine” products	24%	14%
Shopping at malls	4%	2%
Other	5%	21%

*Multiple responses permitted.

ENTERTAINMENT ACTIVITIES*

Entertainment Activities	2022	2023
Festivals/Events	26%	33%
Agricultural fairs	5%	5%
Attend sporting events	6%	5%
Botanical Gardens	4%	5%
Outdoor fun centers	3%	4%
Bars/nightlife	1%	3%
Amusement/theme parks	3%	2%
Animal parks/zoos	1%	1%
Children's museums	2%	1%
Water parks	1%	1%
Summer camps	<1%	<1%
Horseback riding	<1%	<1%

TOURING & SIGHTSEEING ACTIVITIES*

Touring & Sightseeing Activities	2022	2023
Enjoying the ocean views/rocky coast	49%	45%
Sightseeing	42%	44%
Driving for pleasure	32%	32%
Nature cruises or tours	26%	28%
Tours of communities/local architecture	17%	22%
Photography	25%	22%
Enjoying the mountain views	23%	18%
Wildlife viewing/bird watching	23%	17%
Viewing fall colors	16%	15%
Other	5%	7%

ACTIVE OUTDOOR ACTIVITIES*

Active Outdoor Activities	2022	2023
Hiking/climbing/backpacking	24%	19%
Exploring State and National Parks	16%	11%
Camping	6%	3%
Bicycling touring	4%	2%
Hunting	3%	2%
Snowshoeing	2%	2%
Mountain/Fat Biking	3%	2%
Riding all-terrain vehicles	2%	1%
Alpine skiing/snowboarding	1%	1%
Nordic skiing	1%	1%
Snowmobiling	1%	<1%
Other	12%	15%

HISTORY/CULTURE ACTIVITIES*

History/Culture Activities	2022	2023
Visit historic sites/museums	12%	11%
Visit art museums/local artisan studios	8%	11%
Attend popular music concerts/events	10%	10%
Get to know the local people and/or culture	4%	3%
Attend plays/musicals/theatrical events	2%	2%
Painting/drawing/sketching	3%	2%
Attend operas/classical music events	1%	1%
Other	3%	7%

WATER ACTIVITIES*

Water Activities	2022	2023
Going to the beach	16%	16%
Canoeing/kayaking	15%	12%
Fishing	13%	11%
Sailing	8%	9%
Outdoor swimming	10%	8%
Motor boating	8%	8%
Pool swimming	3%	2%
White water rafting	1%	<1%
Surfing	1%	<1%
Water skiing/jet skiing	1%	<1%
Other	1%	1%

OTHER STATES/PROVINCES VISITED*

Other States/Provinces Visited	2022	2023
No other states/provinces	62%	63%
New Hampshire	24%	24%
Massachusetts	18%	16%
Rhode Island	8%	6%
Connecticut	5%	5%
New York	7%	4%
Vermont	7%	4%
New Brunswick	<1%	<1%
Newfoundland and Labrador	<1%	<1%
Nova Scotia	<1%	<1%
Ontario	1%	<1%
Prince Edward Island	<1%	<1%
Quebec	1%	<1%
Other	1%	1%

TRAVELING IN MAINE*

Maine Regions Visited	2022	2023
Greater Portland & Casco Bay	48%	50%
No other regions	28%	38%
The Maine Beaches	20%	27%
Downeast & Acadia	21%	14%
Kennebec Valley	7%	11%
The Maine Highlands	10%	5%
Maine Lakes & Mountains	11%	5%
Aroostook County	2%	1%
Other	<1%	2%

VISITOR JOURNEY : POST-TRIP EVALUATION



RECOMMENDING MAINE/REGION OF TRAVEL

Recommending Maine	2022	2023
Would recommend Maine	96%	97%
Would not recommend Maine	<1%	<1%
Not sure	4%	3%

Recommending Regions	2022	2023
Definitely recommend region	56%	63%
Probably would recommend region	41%	35%
Would not recommend region	<1%	<1%
Not sure	3%	2%

RETURNING TO MAINE

Returning to Maine	2022	2023
Definitely will return	51%	56%
Probably will return	31%	32%
Probably will not return	1%	1%
Not sure	17%	11%

SATISFACTION

Satisfaction	2022	2023
Very satisfied	32%	64%
Satisfied	65%	34%
Dissatisfied	1%	1%
Don't know	2%	1%

TRIP EXPECTATIONS

Exceeded Expectations	2022	2023
Activities & attractions	62%	58%
Lodging	42%	42%
Friendliness of people	33%	17%
Shopping	19%	15%
Restaurants	21%	14%
Authentic & unique communities	23%	14%
Customer service	17%	11%
Value for your money	16%	9%

OVERCROWDING

Overcrowding	2022	2023
Overcrowded	17%	16%
A little overcrowded	37%	36%
The number of visitors was fine	39%	44%
Not at all overcrowded	6%	4%
Other	1%	<1%

STUDY METHODS



METHODOLOGY



Visitor Tracking

1,391 interviews were completed with visitors to Midcoast & Islands online and in-person at local attractions, parks, hotels, visitor centers, Service Plazas, shops, downtown areas and events between December 1st, 2022 and November 30th, 2023.

Economic Impact

Total economic impact of tourism on Midcoast & Islands is a function of direct spending by visitors to Midcoast & Islands, as well as the indirect and induced effects of this spending, such as increased business and household spending generated by tourism dollars.

Multiplier

Downs & St. Germain Research uses IMPLAN economic modeling to calculate the multiplier based on direct expenditure data collected from visitors to Midcoast & Islands. Agencies such as FEMA, EPA, Federal Reserve Bank, and the Bureau of Land Management use IMPLAN modeling. Midcoast & Islands's multiplier is 1.51.

MIDCOAST & ISLANDS

2023 Economic Impact & Visitor Tracking Report

DECEMBER 2022 – NOVEMBER 2023

Downs & St. Germain Research
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dsg-research.com

